

MILITARY OPERATIONS RESEARCH SOCIETY



*Military Recruiting And Retention
For The 21st Century
Mini-Symposium
27 - 30 September 1999*

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UNCLASSIFIED
Approved for Public Release

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REPORT DOCUMENTATION PAGE			Form Approved OMB No. 0704-0188	
Public reporting burden for this collection of information is estimated to average 1 hour per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to Washington Headquarters Services, Directorate for Information Operations and Reports, (0704-0188), 1215 Jefferson Davis Highway, Suite 1204, Arlington, VA 22202-4302. Respondents should be aware that notwithstanding any other provision of law, no person should be subject to any penalty for failing to comply with a collection of information if it does not display a currently valid OMB control number. PLEASE DO NOT RETURN YOUR FORM TO THE ABOVE ADDRESS.				
1. REPORT DATE (DD-MM-YYYY) 15 December 2000		2. REPORT TYPE Mini-Symposium Proceedings		3. DATES COVERED (From – To) 27-30 September 1999
4. TITLE AND SUBTITLE Military Recruiting and Retention for the 21st Century Mini-Symposium Proceedings			5a. CONTRACT NUMBER N00014-99-C-0113	
			5b. GRANT NUMBER	
			5c. PROGRAM ELEMENT NUMBER	
			5d. PROJECT NUMBER	
6. AUTHOR(S) Dr Harry Thie, FS Christine Fossett, FS Corrina Ross Witkowski, Editor/Publisher			5e. TASK NUMBER	
			5f. WORK UNIT NUMBER	
			8. PERFORMING ORGANIZATION REPORT NUMBER	
7. PERFORMING ORGANIZATION NAME(S) AND ADDRESS(ES) Military Operations Research Society, 101 S. Whiting St. #202, Alexandria, VA 22304			10. SPONSOR/MONITOR'S ACRONYM(S)	
9. SPONSORING/MONITORING AGENCY NAME(S) AND ADDRESS(ES)			11. SPONSOR/MONITOR'S REPORT NUMBER(S)	
12. DISTRIBUTION/AVAILABILITY STATEMENT Distribution Statement A: Approved for Public Release; Distribution Unlimited				
13. SUPPLEMENTARY NOTES				
14. ABSTRACT This publication is the proceedings from the Military Recruiting and Retention for the 21st Century Mini-Symposium.				
15. SUBJECT TERMS				
16. SECURITY CLASSIFICATION: UNCLASSIFIED			17. LIMITATION OF ABSTRACT Unlimited	18. NUMBER OF PAGES
a. REPORT Unclassified	b. ABSTRACT Unclassified	c. THIS PAGE Unclassified		
				19b. TELEPHONE NUMBER (include area code) 703-751-7290 FAX: 703-751-8171

CLASSIFIED BY:

DECLASSIFIED ON:

SECURITY CLASSIFICATION OF THIS PAGE

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Military Recruiting and Retention for the 21st Century—Executive Summary

Dr Harry J. Thie, FS, RAND

Christine A. Fossett, FS, USGAO

The military services are experiencing difficulty recruiting and retaining sufficient numbers of quality enlisted people to meet operational requirements and end strength requirements. Recent recruiting efforts sometimes have not met goals, and military personnel are opting to leave some service occupations at rates too high to maintain adequate experience levels. To address these issues, MORS held a Mini-Symposium on Military Recruiting and Retention for the 21st Century on 27-30 September 1999.

This report summarizes observations made by mini-symposium speakers and participants. The Executive Summary covers observations from the plenary sessions, participant observations about recruiting and retention issues, and suggestions for programmatic and analysis-related improvements. Briefing reports on specific topics covered during the mini-symposium follow this summary. Also, the acronyms, Terms of Reference, list of participants and plenary session presentations are included in Appendices A through D, respectively.

Goals and Objectives

The overarching goal for this special meeting was to contribute to the deliberate planning of military personnel management efforts by developing a clear understanding of factors that shape the recruitable population pool and the retention of those already in military service. More specifically, the meeting set out to accomplish four objectives:

1. Identify factors that have the greatest impact on recruiting and retention and the gaps in our knowledge about incorporating these factors in analyses.
2. Identify the strengths and limitations of available data sources, measures, tools, and methodologies applicable for analyzing recruiting and retention issues.
3. Evaluate methods for analyzing policy alternatives, including predicting recruiting resource requirements and retention incentives.
4. Determine the need for and use of new or advanced tools, methods, or research to remedy current shortfalls in analyses and gaps in our knowledge.

Approach

More than 200 manpower, personnel and resource analysts and functional experts from DoD, other government agencies and the private sector participated in three days of stimulating discussions. The Mini-Symposium included plenary sessions, composite sessions on recruiting and retention and six concurrent working group sessions on more focused topics. Given the diverse professional backgrounds and expertise of the participants, these sessions were designed to foster and maximize the exchange of information. The plenary session speakers provided high-level perspectives on both recruiting and retention, whereas speakers in each of the two composite sections focused more on recruiting or retention, respectively. The working groups scheduled speakers to address specific topics and provided time for all participants to contribute their insights and discuss issues. The success of the Mini-Symposium is attributed to the active participation by all.

Plenary Sessions

High-level perspectives were provided in several plenary sessions. In the keynote address, the Secretary of the Army, the Honorable Louis Caldera, highlighted serious recruiting and retention problems facing not only the Army but all of DoD. Brig Gen Pat Adams, Joint Staff-J1, described problems that led the Joint Chiefs to change their perspective on personnel readiness.

Several other plenary sessions elaborated on challenges. Views on the labor market from our competitors were provided by a distinguished panel, including the Honorable Al Borrego, Assistant Secretary of Labor; MG (ret) James Allen, State of South Carolina; Dr Renee Lerch, Ford Motor Co.; and Patrick O'Leary, United Parcel Service (UPS). VADM Pat Tracey, Office of the Secretary of Defense (OSD), noted challenges facing analysts.

Other plenary speakers provided different perspectives on solutions. Congressman Steve Buyer, House Armed Services Committee, articulated seven factors that needed to be considered when addressing recruiting and retention problems. MajGen Garry Parks, USMC, and RADM Barbara McGann, USN, also provided ideas for solutions.

Composite and Working Group Sessions

Composite sessions on recruiting and retention issues set the stage for six working groups to focus on specific topics, as shown in Table 1. The recruiting composite sessions included perspectives on current recruiting challenges by senior enlisted recruiters from each service; lessons learned from past recruiting eras; and, what recruiting may face in the future. Retention composite sessions included perspectives on current retention issues from panels of senior enlisted representatives, OSD and service headquarters retention officials.

Table 1: Composite and Working Groups

<i>Composite Sessions</i>	<i>Working Group Topics</i>	<i>Leadership</i>
Recruiting Issues Chairs: COL Greg Parlier and LTC Greg Hoscheit, US Army Recruiting Command	Advertising Effectiveness	Herb Shukiar, RAND Dr Paul Hogan, The Lewin Group COL Kevin Kelley, US Army Recruiting Command
	Recruiter Effectiveness	John Noble, Navy Recruiting Command MAJ Neil Fitzpatrick, US Army Recruiting Command
	Demographics/Psychographics	Hugh Dempsey, TRADOC Dr Naomi Verdugo, OSD CPT Tony Perry, TRADOC
Retention Issues Chairs: Dr Al Robbert, RAND LTC Jeff Perry, OSD Pat Crouse, Logicon	Screening, Selection, Attrition, Retention	Larry Looper, Air Force Human Systems Wing Don Whitfield, Logicon
	Force Structure and Strength Management Effects	LtCol Scott Hagin and Maj Jay Jacobson, Air Force Personnel Operations Agency
	Direct Influences and Causes of Retention	LTC Eli Alford, US Army PERSCOM Denny Baer, Logicon

Toward the Future: Plenary Observations

The high-level perspectives provided in the plenary sessions generally focused on problems, competitors, challenges and solutions. These are described in this section.

Do We Have A Problem?

The consensus of the Mini-Symposium participants was that we do have a problem. The Secretary of the Army and the Director of Manpower and Personnel for the Joint Chiefs of Staff, in particular, expressed their perceptions of the problem.

Secretary Caldera stressed that manning the forces is the most important function of the services. Having the right numbers and skill mix is critical to performance and impacts readiness. The serious recruiting and retention challenges today impact manning. These challenges have been masked for several years by our downsizing when we did not replace one for one. Corrective actions will take time to show results.

Three of the many problems experienced with advertising illustrate the challenges we face, according to Secretary Caldera. First, we have not conducted the research needed to segment the youth market to focus our recruiting efforts. Second, we do not have the in-house professional marketing expertise to use research results to develop our marketing strategy and messages. Finally, the armed forces do not have positive "brand" recognition with today's youth.

Secretary Caldera described several steps that the Army has taken to address the challenges. We are upgrading the sales (recruiter) force with improved recruiter selection, incentives and equipment and positioning that sales force to exploit selected markets. We are improving our market research and using the results to target our messages and expand our markets.

Secretary Caldera said that the basic challenge to the analytic community is to provide better research to provide better answers for management and policy decision making. The fundamental question to address is "How effective is our approach given our scarce resources?" We need to know what works. This includes: How effective is the program? How much did it cost? And how cost-effective is it relative to other programs? A more specific question is "How applicable are today's recruiting quality standards?" Are they valid for today's youth and for the force we need today and tomorrow? Is the distinction between high school and non-high school graduates meaningful, or do we need finer distinctions, such as rank in class? Should the Armed Services Vocational Aptitude Battery (ASVAB) be given in Spanish?

Brig Gen Pat Adams, Joint Staff-Director of Manpower and Personnel (J1), described why the Joint Chiefs changed their perspective on personnel readiness. Using the catch phrase "Houston, we have a problem...", he emphasized that the services have problems sustaining the force. These problems include difficulties in replacing the professional with 8- to 12-years experience; keeping their most skilled people; and paying them adequately. These statements described the military 19 years ago, but we face similar problems today. In addition, the JCS was more cognizant of early signs of quality and experience erosion. Although the supply of youth is rising, their flow into the military is dampened by changes in their propensity (youth interest in military service has declined), and their college-attendance patterns (a greater proportion of youth are going to college). In the past, there was a direct correlation between our recruiting expenditures and recruit quality, but in fiscal year 1994, quality began to slip despite increased funding. This negative trend puts more pressure on the recruiting force. Also, lower retention poses large out-year recruiting and training costs.

The Chairman's focus is on several core elements that directly affect readiness: competitive pay and allowances; a stable retirement program; accessible quality medical care; suitable housing; and other

quality-of-life programs. RAND's analyses suggests that (1) studies show that pay raises increase recruiting success; (2) a new pay table and proposed changes to the military retirement system will improve productivity incentives by seven percent; and, (3) pay/retirement improvements are estimated to increase overall retention by six percent and increase the proportion of enlistees who stay in service for a 20-year career by 20 percent.

Do We Have Competitors?

A panel of experts outside of DoD provided perspectives on the labor market and described their competition for the same scarce resources that the military are trying to recruit and retain. Panel members — two from other government sectors and two from private organizations — agreed that there is a high demand for skilled labor driven by the need to use technology. To a great extent, we are not experiencing a worker shortage but rather a skill shortage. Panel members provided the following observations:

- The Department of Labor sees the military as a great source of workers for employers. On the other hand, the Job Corps, which is 41,000 workers strong, could be a resource pool for the military.
- When the military started downsizing in 1992, South Carolina began to provide transition services to help find jobs for the military personnel returning to their state. Now they are integrating military recruiting into their employment system, making job referrals to the service recruiters.
- Recruiting and retention problems are relatively new at Ford Motor Company — three years ago, 90% accepted job offers, today only 48% accept; attrition is great for women and minorities during the first 5 years of employment. To counter this, Ford focused internally to make Ford the employer of choice — that is, providing good benefits, family assistance, competitive pay and training — which make it hard for employees to decide to go elsewhere. Externally, Ford developed a pipeline strategy, which includes a Henry Ford Academy (a charter high school), programs for 11th and 12th graders, and family centers to reach earlier grades (kindergarten through 8th grade).
- UPS has many parallel problems: it is difficult to attract workers, and about 50% leave after 6 weeks. The impact is that high turnover costs UPS money, and they cannot deliver to the customers. UPS, therefore, has focused on marketing its jobs and trying to make quitting “not an option” through college-funding incentives.

Do We Have Challenges?

VADM Tracey, OSD, described the current trends affecting recruiting and retention and the challenges to the military human resource system; in this context she described the challenges to the OR community. In the booming economy, unemployment rates show declines for all educational groups, high school graduates, and age groups. The annual population of 18-year-olds will increase slightly overall from 2000 to 2045. But service retention rates are also down. If poor retention persists, DoD will not have needed seasoned leaders. With downsizing, the Army has 38% fewer soldiers, the Navy has 30% fewer ships, and the Air Force has lost one-third of its people. At the same time, American operational commitments have increased, resulting in increased deployments for active duty, reserve and Guard forces. It is in this context that the OR community is challenged to provide better insights into economic, demographic and social trends and their potential impact on DoD.

VADM Tracey further described the purpose of the military human resource system — to make warriors: to fill today's jobs, to grow military leaders, and to fulfill individual needs. The military is challenged to be the “employer of choice” to succeed in a very competitive market. Within the military, the focus is on

balancing unit and individual readiness — sequencing assignments, ensuring educational growth, promoting leaders and ensuring placement to maximize unit readiness. These challenges provide fertile ground for OR analysts to use, or to develop, excellent tools for innovative policy analysis — to push the (math) envelope to develop ways to model the future but to do so with less data because historical data is “outdated.” The OR community could also help improve our definitions and measures of deployment and retention and the relationship between the two. Further, the OR community could help to clarify the tradeoff choices for human resource decisions.

Are There Solutions?

Congressman Steve Buyer, House Armed Services Committee, provided perspectives on several areas that he believes need new policies or approaches if recruiting and retention are to improve:

- First, DoD adds to its recruiting woes by poor budgeting and execution practices — such as inconsistent and 11th-hour funding of recruiting accounts. The services are not committed to sound marketing planning as demonstrated by reduced funding — such as cutting Army recruiting operations, Navy recruit advertising and Air Force enlistment bonuses. Consistent, on-time money is the key to recruiting success.
- Second, civilian and uniformed leadership must get smarter on advertising to maximize marketing effectiveness. Understanding commercial marketing processes is critical.
- Third, recruit quality saves money, improves effectiveness and affects retention. When recruiting is under stress, we must not lower quality to make recruiting goals.
- Fourth, the military has to offer a competitive employment package, but we must also include incentives such as duty, honor, country — that is, patriotism and service to the nation. Advertising also must challenge youth to get involved.
- Fifth, disenchanted uniformed personnel, veterans and persons who are no longer believers in a military career, influence potential recruits with their negative message about the military. We must turn those attitudes around.
- Sixth, “socialization” of the military — in the sense of imposing contemporary social mores on the military — is corrosive to readiness, detracts from the war-fighting spirit, and drives people out of the military. Social issues should not be ignored, but if not limited they could damage our combat capability. Wartime challenges require that military standards be different and held apart from the society as a whole.
- Finally, deployments must be managed to reduce stress on the force and preserve combat skills, and hopefully improve retention.

Congressman Buyer concluded by emphasizing that the military must not allow its standards for conduct and behavior to be eroded. The American public respects the military because of those high standards.

MajGen Garry Parks described possible solutions by describing Marine Corps successes. He first described the reality of the marketplace: a higher individual aptitude is required for today’s military; there has been only slight annual growth in the youth population; today’s youth have a low propensity to enlist; there is increased competition among the services for quality recruits; the economy is strong; and job market is robust. While these realities challenge the Marine Corps recruiting mission, MajGen Parks

attributed Marine Corps success to several factors. First, the Marine Corps combines recruiting and recruit training under one commander. Second, they developed a concept of “systematic recruiting,” which provides the tasks, conditions and standards needed to identify, select and train the highest caliber Marine Non-Commissioned Officers (NCOs) to become recruiters. Recruiters are quality leaders from any Military Occupational Specialty (MOS) and are screened by a headquarters team that includes a career recruiter. Third, success is fostered by the Marine Corps’ multifaceted recruiting philosophy: recruiting is a priority from the top down; the best Marines are assigned to the recruiting ranks; Marines are empowered to go out and accomplish the mission; and good performance is recognized with a recruiting ribbon, enhanced pay and benefits and commendations. Finally, the Marine Corps stresses preparing recruits for boot camp and does not give full credit to the recruiter until the recruit graduates from boot camp.

RADM Barbara McGann, USN, described the new recruiting prospects as being “Generation Y,” that is, those who were born between 1979 and 1994 and account for 26% of the US population. They are racially and culturally diverse (one in 3 are not Caucasian), optimistic, self-reliant, ambitious, disciplined, responsible and individualistic leaders. They embrace traditional values of home, family life, community and education. Most live in affluence, want to make money, and are concerned about college and employment. They have grown up on-line and prefer the internet to TV. They respond to ads differently — they are a bit more jaded and skeptical; messages need to be pertinent, well-produced, exciting, information- or explanation-based and truthful. They are brand loyal for six to eight months but desire style and quality over price. Empowerment and adventure allure this group. Overall, they may be more inclined to military service. Recruiters need to understand and market to Generation Y. We need to continue to pursue screening tools to ensure that we select recruiters who can do this.

Where Are We Now? Recruiting and Retention Observations

With the plenary observations providing a high level of context, the composite and working groups further deliberated on specific issues regarding recruiting and retention. We now summarize key observations — first, those dealing with recruiting issues and, then, those on retention issues.

Recruiting Observations

The composite and working groups focusing on recruiting highlighted five themes. First, knowledge-sharing and cross-communication need to be fostered among the private sector, the military services and OSD. Structured interaction on a recurring basis would permit the services to share programmatic and analytic initiatives and to work with OSD to determine what could best be done with joint collaboration or at the OSD level.

Second, given that the state of the market population is constantly changing, a more strategic, long-term perspective is needed for carrying out research, program initiatives and advertising. To be more effective and efficient, these efforts require a sustained commitment rather than the abrupt starts and stops experienced in the past.

Third, more research needs to be directed at: (1) understanding the changing market population and the emerging needs of the services for their future personnel and manpower requirements; and, (2) ensuring that the right market is being recruited for the 21st century military using the right selection instruments and incentives.

Fourth, several cultural changes regarding recruiting are needed. For example, advertising needs to reach multiple influencers and recruits; recruiting duty should be an essential component of military career progression; the recruiting market needs to be expanded to reach the unemployed and “missing”

populations (those historically overlooked by demographers and recruiters); and new media, such as the internet, need to be exploited.

Finally, a model of the total recruiting-retention life-cycle context needs to be developed to better understand interrelationships and provide an analytic basis for allocating resources to recruiting and retention programs. In particular, better means are needed to track resources that affect recruiting-retention outcomes but cross multiple appropriations and programs. A conceptual framework encompassing the key variables is depicted in Figure 1.

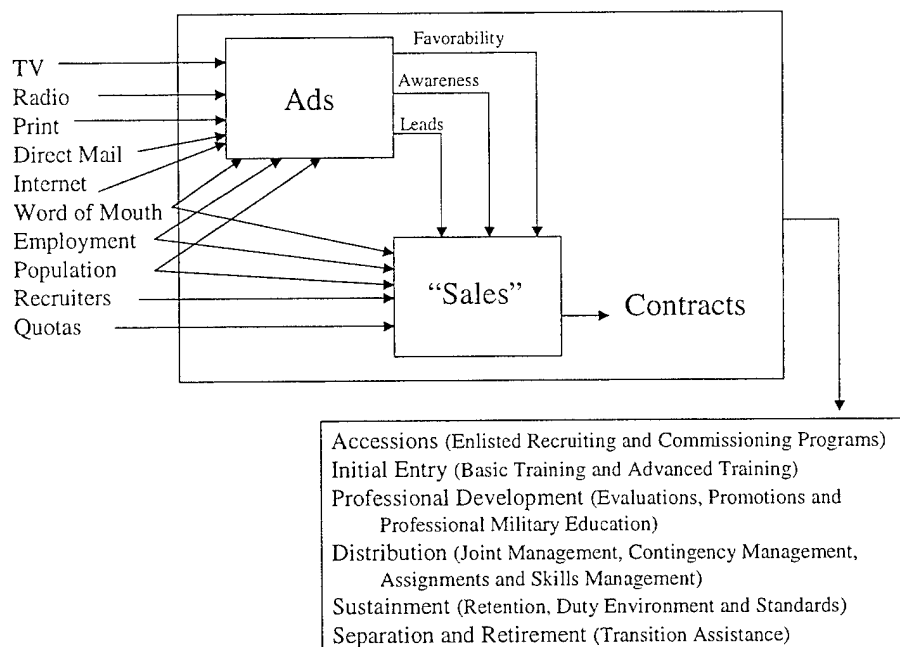


Figure 1. Recruiting-Retention Life Cycle

This conceptual model indicates the need to simultaneously consider the combined effects of advertising, recruitment and retention-related measures of effectiveness. The goal of the recruiting process is not just to produce accessions that meet the military's physical, moral and quality standards. Rather, it is to produce accessions who meet these standards *and* wish to make the military a career. The decision maker should have the ability to trade off advertising, recruitment, and retention dollars. What, for example, is the right mix of advertising, recruitment and retention dollars to promote a 20-percent increase in accessions who successfully complete their first term of service? What is the right advertising/recruitment/retention mix to increase by 10 percent the number of accessions who stay for a 20-year career? A directly related question, one amenable to classic analytic methods is, "What demographic and/or psychographic factors are correlated to a positive retention decision at the first reenlistment point?"

Retention Observations

Six themes emerged from the composite and working groups focusing on retention. First, retention objectives are soft. The services' aggregate retention objectives appear to be rational in that the Air Force, with its high-tech mission, demands higher retention; the Marines, with their emphasis on youth and vigor, demand lower retention; and the other services fall in between. However, these objectives are

based on very subjective impressions of how much experience is required for the services to effectively perform their missions.

Second, a more analytically rigorous sense of retention objectives must be built from the bottom up — analyzing the needs of each occupation and summing across occupations to determine aggregate end-strength needs. Occupational-level analysis, unfortunately, requires work at a level of detail that is difficult and painful for thinly staffed force structure analysts and planners.

Third, many of the key independent variables that influence retention are not well defined or measured. Compensation is both well defined and well measured; hence, it is well studied. Tempo is defined but not well measured. Quality-of-life is neither well defined nor well measured. Leadership is defined in the dictionary but is difficult to capture (measure) in a way that can be entered into multivariate analysis of retention influences. A conceptual framework encompassing the key variables is depicted in Figure 2.

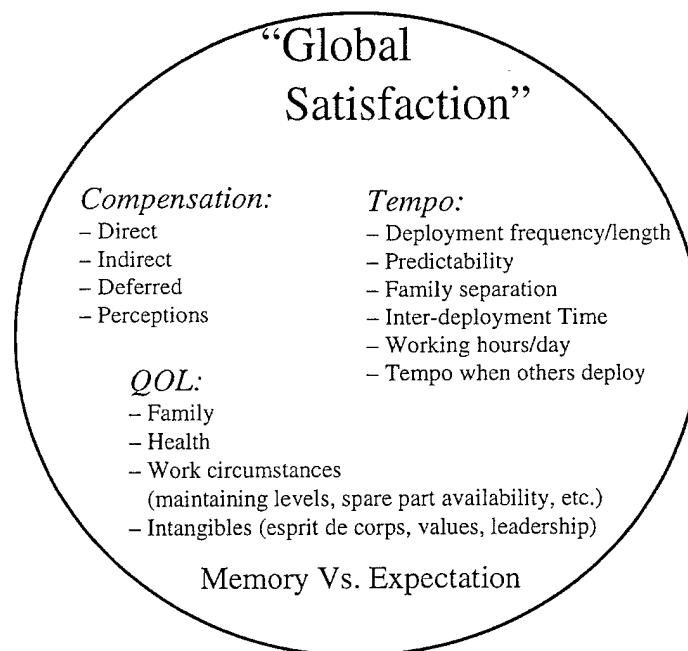


Figure 2. Direct Influences and Causes on Retention

Figure 2 shows several influences that should be considered as contributors to a measure of “global life satisfaction.” These include (1) various aspects of compensation and servicemembers’ perceptions of compensation adequacy; (2) standard frequently measured aspects of tempo such as deployment length and frequency, but also measures that are not captured today like the additional work burdens suffered by servicemembers left behind when others are deployed; and (3) aspects of quality-of-life, including “work circumstances” like adequate manning and other measures of one’s wherewithal to get the job done. Also, we need to capture both memory and expectation. Our data captures past events (what soldiers remember), but retention decisions may be based more on anticipation of future circumstances. This framework is not exhaustive. Examples of other factors to consider include performance evaluation scores, rank/rate achieved at point of reenlistment, relative standing in the individuals unit and work center, number of weeks of formal schooling completed during enlistment, and level of debt.

The fourth key observation about retention made by mini-symposium participants was that more recognition needed to be given to the impact of retention and attrition on how well the force structuring and recruiting jobs are accomplished. Retaining better people in the right numbers will help reduce the recruiting problem, and the reverse is also true.

Fifth, a more appropriate measure of merit should be used for program management. Currently the end strength requirement is set in law. The congressional mandate to meet a narrow one-time-per-year strength number rather than a wider, more flexible band over time adds to recruiting and retention problems. Having a band would allow the services to manage toward an objective force and be able to manage accessions, training (filling schoolhouses) and manning the units with mission-ready people. Also, DoD needs to manage the force based on man-years rather than end strength at a point in time to ensure we have the right experience to meet mission demands.

Finally, retention-focused resources have atrophied during the drawdown of military service strengths. Retention management staffs, service retention infrastructures, analytic staffs devoted to retention issues, and retention-related research funding are generally well below levels prevailing before the drawdown.

What Initiatives Should be Assessed for Potential for Improving Recruiting and Retention?

Based on these observations, the mini-symposium participants made numerous suggestions for improving recruiting and retention programs. The key suggestions are described in this section.

First, the services should assess and aggressively exploit their early favorable experience with the internet in generating high quality leads with dramatically higher conversion rates than other advertising media.

Second, influencers, such as parents, teachers, counselors, currently serving military personnel and veterans, are an important target audience. Advertising to this audience should be evaluated to ensure that it builds a good image of the military and positively influences prospects. OSD should be responsible for building the corporate image that the military is a good, solid organization and provides excellent training and career opportunities for our nation's youth.

Third, the Army's college program has now been replicated by competitors. Therefore, DoD should study alternatives and consider creating a DoD-wide program that competes favorably with other employers. For example, one such program may be that offered by the Navy whereby all of their training and military education is assigned an appropriate amount of accredited college credit and applied to each sailor's record. During a four year enlistment, a sailor can expect to complete about 60 hours of credit and receive an Associate's Degree.

The military services also must place a higher value on recruiting duty, which should be the mission of all service members and a central part of each service member's career. The hypothesis is that recruiters will be more effective when an assignment to recruiting duty becomes a core component of military career progression.

Greater recruiter effectiveness would likely be achieved if recruiters had better "corporate" support in terms of a "basic life support package." Analysts should determine the impact of special adjustments to incremental pay for recruiters (like sea pay), more realistic housing allowances for high cost areas, supplemental health care in areas not supported by TRICARE, and other personnel and pay adjustments.

Also, recruiters need state-of-the-art technology, such as laptops, cell phones, fax machines, etc. In addition, they need training in the most efficient use of such tools. Longer-range initiatives to develop a virtual recruiting environment should be studied. Similarly, on-line training capabilities need to be

developed. On-line user friendly tutorials should cover recruiting processes as well as the use of new technologies.

The services currently study the attributes of “good” recruits to define their future market. This circular approach excludes potential recruits, such as the unemployed, migrant workers or frequent movers, who could also be good servicemembers but do not fit the current attribute profile. We may need to look at markets that now produce few recruits. Including these and other groups in the recruiting market would expand the base for recruiters, but others cautioned that it could also lead to greater retention problems downstream.

Several suggestions were made to improve retention, beginning with Delayed Entry Program (DEP) management and the use of personnel in DEP. For example, studies should explore the feasibility of: (1) providing DEP personnel access to military facilities (such as PX/BX, commissary or recreation activities); and, (2) assigning personnel in DEP to the Selected Reserve to pay them for their time or to count for pay once the individual is on active duty. Also, retention needs to be managed by occupation and location. Selected reenlistment bonuses can help selective retention. But more money will not always solve retention problems. Finally, to improve retention we need to be responsive to servicemembers’ high involvement and concern with family. In the past, the services had a saying “We take care of our own.” Today, the attitude is “You take care of yourself.” We need to ensure that when a servicemember is deployed, he or she can be assured that if an emergency arises, a military representative will step forward and help the family.

What Initiatives Can Improve Analyses That Support Recruiting and Retention?

The mini-symposium participants also made numerous suggestions for improving analyses that support recruiting and retention programs. Key suggestions are included in this section.

First, a DoD-wide retention cooperative or forum should be organized for the services to regularly exchange information. DoD and the services also should standardize their use of terms like retention and reenlistment rates.

The total recruiting-retention life-cycle context must be considered when allocating advertising and other recruiting dollars. Analytic estimates of the tradeoff between advertising and other recruiting resources are based on data from the early 1990s. Efforts to reestimate these relationships using more recent data would permit a more optimal allocation of recruiting resources. Further, the analytic basis should include post-recruitment active-duty issues, what the group called *retention*. For example, what mix of advertising and other recruiting dollars will result in an enlisted force with the highest first-term completion rate? What mix would result in the highest rate of personnel who make the military a career?

In addition, the services should compare their analysis and retention-specific models with the purpose of applying a model or parts thereof DoD wide. Specifically, the Air Force and the Army could apply a Navy model that is being developed. The services should also share common compensation behavior models, such as RAND’s Compensation, Accessions and Personnel Management (CAPM) model, which is being updated to today’s economy and may be used by the Air Force to assess service costs to train/grow a new accession to replace an experienced servicemember who leaves.

Also, a standard exit survey or focused interview should be used by all the services to facilitate understanding reasons for early attrition. Also, more attention and resources should go into understanding the reasons and characteristics of those deciding to reenlist. The services also need to determine how much attrition is inevitable and acceptable, especially during training.

In addition, systematic retention/attrition tracking systems by year-group cohort as well as occupation are needed. Retention management models that predict and manage the force by occupation are critical to understanding occupation-level retention.

There is a need for better medical and psychological screening and use of such screening to predict early attrition and to identify predilection to reenlistment. Private industry continues to use such screens, and their success needs to be examined.

Leadership is key to retention. Successful commanders and units should be used as examples of what works in retention and publicize their successes.

As mentioned earlier, key direct influences and causes of retention are often not considered. For example, key aspects of compensation are usually modeled, but the element of servicemembers' perceptions of compensation adequacy are often not included. The frequently measured standard aspects of tempo, such as deployment length and frequency, are inadequate to fully portray today's pace. For instance, no one captures the additional work burdens suffered by servicemembers left behind at CONUS locations when others on their installation deploy OCONUS. Also expectations are not captured. For example, if a servicemember anticipates an unacceptable level of future tempo and decides to depart the service, deployment indicators in the servicemember's personal history may not adequately model this decision.

In addition, aspects of quality-of-life are not captured. A recent study (GAO, Sept. 99) provides some insights into work-related intangible reasons for dissatisfaction with military life, but more research is needed to fully understand reasons for leaving and staying. Leadership and other intangibles (such as service to country) are key but not well measured.

DoD should use private industry sources to help establish upper and lower bounds on certain key parameters. For example, DoD should look at similarly structured private industries and their retention rates for similar jobs (e.g., an aircraft mechanic for Delta Airlines). For military specialties such as infantry, where there is no private sector correlation, compensation for similar demographics — age, workload, time away from home, etc. — should be compared.

Because current analytic efforts, while useful, provide only partial solutions and achieve only *marginal gains* in improving overall recruiter effectiveness, potential areas for the application of operations research methodologies were suggested. These areas included: (1) evaluating pilot projects for selecting recruiters; (2) assessing modular exportable training packages for recruiters; (3) providing tools and technology for recruiters; and, (4) analyzing goal setting and production systems for restructuring recruiter incentives. Analysts should also evaluate the impacts of implementing changes and perform cost/benefit analyses to determine return on investment.

Summary

DoD will continue to be challenged to recruit and retain the numbers of quality enlisted servicemembers necessary to meet operational requirements in the 21st century. The analytic communities will also be challenged to contribute to making recruiting and retention programs more effective and efficient. For analysts to better enable program success, they will need to foster knowledge-sharing to channel their scarce resources into productive, non-duplicative, useful and usable models, analyses and research. This mini-symposium was unique for MORS in that a mix of functional experts; program and budget analysts; and operations researchers from diverse disciplines was sought and achieved as a means towards knowledge-sharing. Moreover, the meeting attained the desired blend of organizational participation: all uniformed services were represented, as well as defense and other government, public and private sector,

military and civilian, senior and junior, experienced and inexperienced, active and reserve, headquarters and field, officer and enlisted personnel. The richness of the resulting exchanges in detailed discussion (working groups), at a thematic level (in the composite groups) and at a level of opportunities and challenges (in the plenary sessions), contributed to achieving the stated mini-symposium goals and objectives.

Military Recruiting and Retention for the 21st Century

Composite Group 1 RECRUITING

**Chair: COL Greg Parlier
Co-Chair: LTC Greg Hoscheit**

The objective of the recruiting composite group sessions was to provide perspectives on the past, current status, and future of recruiting. The presentations included a panel of senior enlisted recruiter representatives, a second panel looking at past trends and challenges in military recruiting, and a third panel looking to the future about recruiting for the military and the private sector.

Recruiting: Senior Enlisted Representatives' Perspectives

- Panel included top enlisted recruiters from the four military services
 - CSM Roger L. Leturno (US Army Recruiting Command)
 - MCPO S.E. Holton (US Navy Recruiting Command)
 - CMSgt Jay Markus (Air Force Recruiting Service)
 - SgtMaj Filipo Ilaoa (Marine Corps Recruiting Command)

This panel consisted of senior enlisted personnel selected by the top enlisted advisors on each of the four military services' staffs (Sergeant Major of the Army, Chief Master Sergeant of the Air Force, etc.). The panel members, who generally hold top enlisted recruiting positions, included CSM Roger L. Leturno (US Army Recruiting Command), MCPO S. E. Holton (US Navy Recruiting Command), CMSgt Jay Markus (Air Force Recruiting Service), and SgtMaj Filipo Ilaoa (Marine Corps Recruiting Command).

Recruiting: Senior Enlisted Representatives' Perspectives (cont.)

- Recruiting challenges
 - Pervasive and systemic
 - Affect all services and components
 - Not likely to improve given current market conditions
- Short-term recruiting initiatives being undertaken; long-term initiatives being developed
- Traditional recruiter focus of high school graduates is not enough
- More emphasis on recruiter initiatives is needed

A recurring theme of the senior enlisted recruiter panel was a recognition that current recruiting challenges are indeed pervasive and systemic, affecting all the services and components, and not likely to dramatically improve given current market conditions. Furthermore, there is little understanding of cause-effect relationships. Consequently, new short-term initiatives are being undertaken, including "quick ship" bonuses, expanded advertising, recruiter "stop movement" policies while, simultaneously, longer term nationwide tests, such as GED Plus and College First, are under development. There was also general consensus on the growing inability of the high school senior market - the traditional recruiter focus - to meet accession requirements, especially given the continuing difficulty of gaining access to some high schools. In addition to increased focus on the grad and college markets, greater effort must be made to positively influence youth toward military service at a younger age. Other issues addressed included the growing importance of recruiter selection and screening, a need to thoroughly review current "quality marks" in order to assess their continued utility and validity, and the potential for improved effectiveness by shifting from individual-based recruiter production "quotas" to team-oriented concepts that better capitalize on specific recruiter strengths while compensating for weaknesses, such as "station missioning".

Recruiting: Past Recruiting Eras

- Overview of past recruiting trends and challenges
 - Dr Bob Phillips (COL, US Army, ret)
 - Turning recruiting around in the early 1980's
 - Richard G. Trefry (LTG, USA ret), Program Director, Army Force Management School
 - Historical trends from past recruiting eras

The purpose of this panel was to provide an overview of past recruiting trends and challenges. COL Bob Phillips (US Army, Ret.) provided perspectives on turning recruiting around in the early 1980's. LTG (Ret) Richard Trefry, Army Force Management School provided historical trends from past recruiting eras.

Recruiting: Past Recruiting Eras (cont.)

- Lessons Learned:
 - Need unequivocal support from senior leadership
 - Analysis makes a difference
 - Take charge of your advertising
- Encourage education AND military service
 - Increasing college continuation rate
 - Increasing demands on soldier skill and training
 - Reverse trends that preclude military service by future civilian elite

The purpose of this panel was to provide an overview of past recruiting trends and challenges. COL Phillips, formerly Director of Recruiting Operations at the time when MG Thurman was CG, USAREC, condensed his "lessons learned" from that era into three rules relevant for today: Rule #1 - You must have the unequivocal support (especially resource support) from the senior leadership; Rule #2 - Analysis DOES make a difference!; Rule #3 - Take charge of your advertising. He suggested it was again time for another "turning movement" in service recruiting strategy and programs comparable to the transformation that occurred in the early 1980's following the "hollow Army" period.

General Trefry provided a historical summary of recruiting trends and impact upon the Army. The persistent perception that military service could be avoided by college attendance (e.g., college "deferments" during the latter stage of the draft years) must be overcome. Programs and initiatives must be developed that encourage education AND service, rather than one or the other. At least three reasons argue for such a change: the increasing college continuation rate; increasingly greater demands on soldier skill and training; and the need to reverse current trends that preclude military service by America's future civilian elite.

Recruiting: The Future

- Future of recruiting
 - Dr Harry Thie (COL, USA ret), RAND, Senior Analyst
 - Maj Keith Hauk, PAE/USAREC
 - Kenith Lyman, USAREC
 - Dr Wade Hinkle, IDA
 - Seth Feit, AOL
 - Dr Charles Moskos, Prof of Sociology, Northwestern University

Perspectives on the future of recruiting were provided by an expert panel, which included Dr Wade Hinkle, IDA, Dr Harry Thie, RAND, Maj Keith Hauk, PAE/USAREC and Seth Feit, AOL. Dr Charles Moskos, Northwestern University, was unable to attend but provided a statement for the participants' consideration.

Recruiting: The Future (cont.)

- Historical military manpower trends: smaller active components
- Effects on military and private industry of demographic/psychographic patterns in the youth market
- Modern warfare demands upon the human dimension ("quality imperative") in the Revolution in Military Affairs
- Implications of larger sociopolitical and cultural issues in American society

The perspectives on the future of recruiting provided by an expert panel covered several dimensions: historical military manpower trends; recent and emerging demographic and psychographic patterns in the youth market and their effects on the military and private industry; implications of larger sociopolitical and cultural issues in American society; and modern warfare demands upon the human dimension in the Revolution in Military Affairs (RMA), which is not well defined. Discernable trends include a military manpower system characterized by smaller active components with continued use of volunteers and increasing use of civilians, contractors and the Reserve Components. Aggregate active manpower needs will remain at about one-third of a percent of the population, with personnel selection mandating increased emphasis on aptitude, training and education.

While training, skill and advanced technology are recognized as important to success in war, the nature of their relationship is not well understood. Recent findings suggest that "technology" per se is an increasingly poor predictor of modern combat outcomes, whereas skill differential between opposing forces, and their interaction with technology, are a powerful determinant of combat results. Hence, understanding and reinforcing the "quality imperative" in manpower policies will be more important to future battlefield success than current DoD emphasis on weapon modernization and the promise of a RMA.

Finally, several trends are now converging that are forcing the services to increasingly recruit in previously untapped high school grad and college markets. Among these trends are increases in college continuation rates and the college wage premium, as well as increasing demand for higher aptitude servicemen and women.

Traditional incentives focused on long-term commitments, yet first term attrition has been steadily rising resulting in big economic and organizational costs. Dr Charles Moskos suggests offering short-term active commitments (overseas) as a feasible means to tap the college market while reducing attrition. He argues that larger number of the nation's future civilian elite will thus have military service, reversing a long-term trend that has growing implications for civil-military relations.

Recruiting: Broad Themes From Working Group Deliberations

- In addition to cultural changes, several initiatives are needed in recruiting programs
 - Knowledge sharing and cross-communication
 - Strategic perspectives and long-term commitments
 - Research to understand the changing market population and the services' future manpower requirements
 - A total recruiting-retention life cycle model

On this slide, we summarize several themes that emerged from the deliberations of the three recruiting working groups. First, several cultural changes are needed. For example, advertising needs to reach multiple influencers and recruits; recruiting duty should be an essential component of military career progression; the recruiting market needs to be expanded to reach the unemployed and missing populations; and new media, such as the internet, need to be exploited.

Second, in this context of cultural changes, knowledge sharing and cross-communication need to be fostered among the private sector, the military services and OSD. Structured interaction on a recurring basis would permit services to share programmatic and analytic initiatives and to work with OSD to determine what is best done with joint collaboration or at the OSD level.

Third, given that the state of the market population is constantly changing, a more strategic, long term perspective is needed for carrying out research, program initiatives and advertising. To be more effective and efficient, these efforts require a sustained commitment rather than abrupt starts and stop.

Fourth, more research needs to be directed at understanding the changing market population and the emerging needs of the services for their future personnel and manpower requirements—and ensuring that the right market is being recruited for the 21st century military.

Finally, a model of the total recruiting-retention life cycle context needs to be developed to better understand interrelationships and provide an analytic basis for allocating resources to recruiting and retention programs.

More specific observations from the three recruiting working groups are included in their sections of this report.

Military Recruiting and Retention for the 21st Century

Working Group 1 ADVERTISING

Chair: Herb Shukiar
Co-Chair: Dr Paul Hogan
Co-Chair: COL Kevin Kelley

This working group focused on the advertising component of the recruiting-retention life cycle. Working group participation included OSD, all services, including the Coast Guard, as well as representatives from the research community and private sector advertising and media-monitoring agencies. Presentations covered a variety of topics, mostly centered on the issue of measuring advertising's effectiveness. One presentation by a private sector media-monitoring agency demonstrated how a specific advertising campaign's *reach* can be evaluated in a timely manner and adjusted as necessary to promote desired target audience exposure. This briefing highlights the working group discussions that culminated in two key recommendations. First, we believe the services should aggressively exploit their early favorable experience with the internet. Second, we believe the entire recruiting-retention life cycle must be considered when allocating advertising and other recruiting dollars.

Advertising: Working Group Issues

- **How effective is advertising in reaching and influencing the target audiences?**
 - **Two major targets**
 - Potential recruits
 - Influencers
 - **Effectiveness has multiple definitions**
 - Awareness (reaching the target)
 - Sales (influencing the target)
 - **Advertising is just one part of the recruiting-retention life cycle**

The next several slides address the issue of advertising's effectiveness in both reaching and influencing the target audiences. We say *audiences* because indeed there are at least two target audiences that can impact the military's ability to access new recruits. The first audience is the potential recruits themselves. Advertising's goal here is to make the military services attractive as a potential career, or at least as a good vehicle for learning marketable skills that will help recruits in their post-military career. The second audience is the *influencers*, those individuals who can affect a potential recruit's decision to enter the military.

When speaking of advertising *effectiveness*, it is important to realize that there are multiple effectiveness measures. This slide suggests two: *awareness* and *sales*. *Awareness* refers to advertising's ability to make sure potential recruits and influencers recognize that the military is a viable employer. *Sales* reflects advertising's ability to positively influence the potential recruit's decision to join the military.

While advertising plays an important role in the recruiting-retention life cycle, it is only part of a much more complex and resource-intensive process. This process includes other recruiting elements and post-accession active duty service. We believe it is important to address the interactions among all elements of the recruiting-retention life cycle (more about this in subsequent slides.)

Advertising: The Potential Recruits

- **Reaching** potential recruits
 - Reach data is readily available from private sector
 - ... but has limited utility: indicates message heard, not if a positive influence
- **Influencing** potential recruits
 - Limited research available
 - One dated study shows effectiveness

This slide addresses advertising's ability to reach and influence potential recruits.

Reach data is readily available from the private sector. It is of limited utility, however, because it only indicates that the target audience has heard the message. It does not indicate whether the target audience has been positively influenced by the message.

Measuring advertising's effectiveness in influencing the target audience is much more difficult because there has been limited research addressing this issue. One dated study shows that advertising in various media positively affects a potential recruit's decision to enlist.

Advertising: The Potential Recruits

(continued)

- **Navy Study 1990-1994**
 - Measured I-III A high school graduate contracts
 - TV elasticity median: 0.03
 - Other media (direct mail, radio, print) elasticity range: 0.02 - 0.04
- Statistically significant positive effect
- Study is dated, and media landscape has changed

One study examined Navy advertising effectiveness during the 1990-94 period. Study findings show that advertising in the TV, direct mail, radio and print media had statistically significant positive elasticities. A ten percent increase in advertising expenditures in these media would result in a two to four percent increase in quality high school graduate accessions.

The study is dated. First, it was conducted right in the middle of the drawdown, during which the Navy reduced advertising expenditures to zero for a substantial period. Second, during those periods when the Navy was conducting advertising, the dollar levels were relatively low.

Third, during the ensuing five years the media landscape has changed dramatically. For example, the Navy study did not include the internet because internet advertising was not available at that time. Unlike the 1990-94 period, today all services are exploring ways to exploit the internet. Indeed, the internet shows great promise as a vehicle for generating high quality recruits. This study should be revisited and brought up to date to consider the expanded media landscape and today's low unemployment economic conditions.

Advertising: A Promising Medium

- **The internet**
 - Preliminary experience shows internet to be very effective *and growing*
 - High conversion rates but small numbers so far
 - Gets to potential recruits with good computer skills
 - Tends toward higher quality
 - Cheaper over the long term
 - Customizable, non-intrusive, interactive
 - Have not addressed life-cycle issues

The four military services are beginning to use the internet as an advertising vehicle. Experience to date, while preliminary, shows that many potential recruits are *hitting the recruiting button*. Indeed, the Army's internet recruiting site is currently getting about 6,000 hits per day. Of those hits that actually take the next step and contact the Army, the qualified lead conversion rate is running at about ten percent. These recruits tend to be of high quality and have good computer skills. Actual numbers to date are low, but the Army is working to expand use of this vehicle by subscribing to more commercially available internet sites.

While using the internet entails high start-up costs (e.g., to acquire hardware, construct the web sites, provide interactivity and feedback) recurring costs are low. The low recurring costs can make this a very attractive advertising mechanism, especially if increased *hit* volume leads to increased qualified leads, *and if those leads sign up at the current conversion rates*. However, increased internet utilization may result in increased *hit redundancy*, where the same potential recruit hits the buttons of more than one internet vehicle. This could result in diminishing qualified lead rates. It is therefore important for the services to monitor their internet performance carefully to determine when such redundancy arises.

Further, there is insufficient experience to date to determine if the new recruits will result in quality soldiers/sailors/airmen. Will such recruits make it through basic training? Will they find the military satisfying? These life cycle issues need to be addressed.

Advertising: A promising medium

(continued)

- **The internet**
 - Preliminary experience shows internet to be very effective *and growing*
 - High conversion rates but small numbers so far
 - Gets to potential recruits with good computer skills
 - Tends toward higher quality
 - Cheaper over the long term
 - **Customizable, non-intrusive, interactive**
 - Have not addressed life-cycle issues

We want to highlight one additional point about the internet. The internet is a customizable, non-intrusive and interactive vehicle. For example, it can allow the interested prospects to seek more information tailored to their specific interests. Prospects can march through the various links to access only the information they find attractive.

As an example of the internet's flexibility, the Marines are considering placing a mini-version of the ASVAB (a test that determines aptitude for specific military skills) on its web site so that prospects can get a quick, real-time look at those Marine jobs for which they may be qualified. The prospects would fill out the mini-ASVAB, and it would be evaluated in real-time to let them know that they may be qualified for aviation mechanic, computer technician, etc. The prospects would be able to explore such opportunities privately, in a non-intrusive manner. If they find something that intrigues them, they can then make the decision to seek further information.

As another example the Navy (through the Naval Postgraduate School) is developing internet-based computer-assisted instruction tools for use in high schools as primary or remedial learning vehicles in the areas of math and statistics. A large number of military-related examples are planned, e.g., statistics comparing veteran and non-veteran employment rates. This vehicle could not only affect prospective recruits but influencers as well.

We believe that the flexibility the internet provides will result in many such innovative recruiting mechanisms. The internet definitely shows great promise, and we need to exploit it wisely to make sure we understand both its costs and benefits.

Advertising: The Influencers

- **How effective is advertising in reaching the target audience: influencers, e.g., parents, teachers, counselors, internal audience, veterans?**
 - **Services not doing a good job of addressing advertising effect on influencers**
 - **Why are influencers an important target?**
 - Overall influencer target: build image
 - Specific segments: call to action
 - **Who should be responsible to advertise to this target?**
 - OSD to build corporate image
 - Services to promote service image and influence action

We now turn from looking at advertising's effectiveness in reaching potential recruits to its effectiveness in reaching and influencing the *influencers*. Influencers, such as parents, teachers, counselors, currently serving military and veterans, can play an important role in the potential recruit's decision to join the military. Indeed, they can help make the prospect aware that a military career is a good alternative. The services today are not doing a good job in addressing their advertising's effect on this audience.

Indeed, we think influencers are an important target audience, and advertising for this audience should have two objectives: (1) build a better image of the military in the influencer's mind; and, (2) for those influencers that can actually affect a prospect's decision to join, get them to positively influence the prospect.

There are important roles for both OSD and the services in providing advertising to reach this audience. OSD, we believe, should be responsible for building the corporate image that the military is a good, solid institution that provides excellent training and career opportunities for our nation's youth. Each military service, we believe, should have two advertising responsibilities: 1) promote its own service image; and, 2) positively affect the influencer's propensity to recommend the military as a viable career option. Clearly, advertising aimed at potential recruits will also have an effect on influencers, and advertising aimed at influencers will affect potential recruits.

Advertising: Critical Factors

- What *critical factors* must be considered to ensure that analyses of advertising processes are relevant and useful?
 - **Right** target(s) with the **right** messages, and target audiences can have very specific demographic characteristics
 - More than one type of influencer
 - More than one type of potential recruit
 - Clearly defined outcomes correlated with measures of effectiveness
 - Successful accession
 - Improved military awareness
 - Limited research relating advertising's media mix to desired outcomes
 - New research required, taking into consideration expanded media landscape

We now turn to the critical factors that must be considered to ensure that our analyses of advertising processes are relevant and useful. One important factor is making sure we are hitting the right target audiences with the right messages. This factor doesn't address advertising's influence, just whether the *right* target audience is being reached. Commercial media-monitoring agencies provide solid information about this *reach*, and they provide very useful checks on what each medium is saying about reaching its audience. The Army is making good use of one such agency and is pleased with the services and data they provide.

Further, the target audiences themselves can have very specific demographic characteristics. For example, there are many influencers, and the message we wish to impart to a parent may be different than that for a counselor. Similarly, there are many different types of potential recruits, characterized by age, gender, ethnicity and geographic location — to name just a few. Distinct messages may be needed for subsets of the total potential recruit audience (and the demographically diverse influencers too.)

Just knowing that an ad campaign is reaching the target audience does not say anything about the campaign's effect on that audience. As we stated on a previous slide, there is only limited research on the effectiveness of such campaigns in promoting awareness and successful accessions, and some of that research is dated. Clearly we need to initiate new research taking into consideration the expanded media landscape.

Advertising: Critical Factors

(continued)

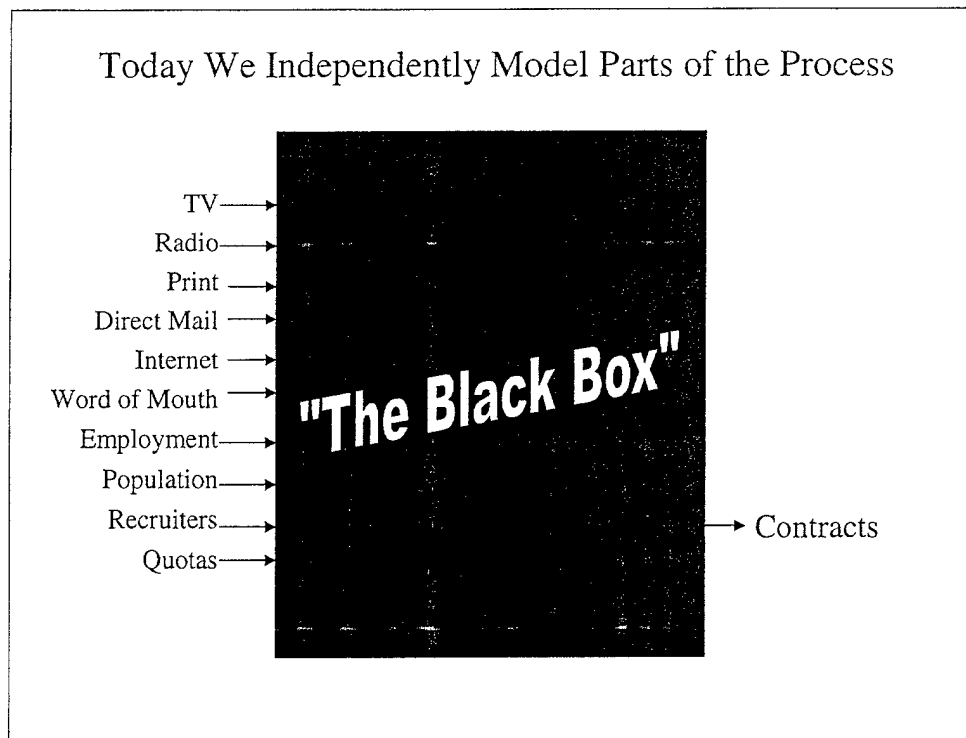
- **What *critical factors* must be considered to ensure that analyses of advertising processes are relevant and useful?**
 - Relate measures of effectiveness to predictors
 - Impressions
 - Awareness
 - Leads
 - Conversion
 - Retention
- **No one has modeled the entire life-cycle process**

However, and we believe this to be a very important point, advertising is only one of several processes that contribute to the accession and successful retention of a soldier/sailor/airman. Some of those components are listed on this slide, and only the first two (impressions and awareness) deal directly with advertising. The next two (leads and conversion) deal with the recruitment process, and the last one (retention) deals with post-accession processes such as basic training, skills training and actual service in the skill area for which the soldier/sailor/airman has been trained.

Typically decisions concerning the right mix of advertising (where to spend our advertising dollars) is done independent of decisions about how to spend recruiting dollars. And resource decisions in the training and active service arenas are done independent of those for advertising and recruiting.

We strongly believe that these resource allocation decisions must be made in the total recruiting-retention life cycle context. The decision maker should have the ability to systematically examine trade-offs among these three types of resources to get the best bang for the total recruiting-retention life cycle buck. Is it better, for example, to invest in more advertising or more recruitment? The measures of effectiveness should include more than just conversion rate. They should also consider successful completion of basic training, skill training, retention to the end of the first term of service and maybe even beyond.

Today, no one to our knowledge has modeled the entire recruiting-retention life cycle and the interactions among the cycle's various components. The next three slides illustrate this point.

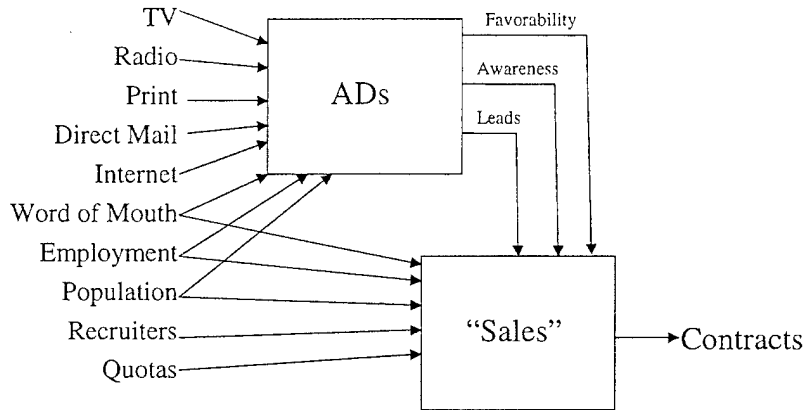


First, the advertising decision maker today allocates resources for the parts of the process that deal with *TV*, *radio*, *print*, *direct mail* and other advertising media such as the *internet*. The assumption is that all the other inputs to the process are held constant. The measure of effectiveness is successful contracts. The recruitment decision maker, on the other hand, allocates resources that deal with *recruiters*, *quotas* and other recruitment-based activities. As with the advertising decision maker, this process also assumes that the other inputs remain constant. The measure of effectiveness is also successful contracts.

Further, there are inputs that neither the advertising nor the recruitment decision maker can control, represented in the figure by *word of mouth*, *employment* and *population*. Both decision makers try to consider these.

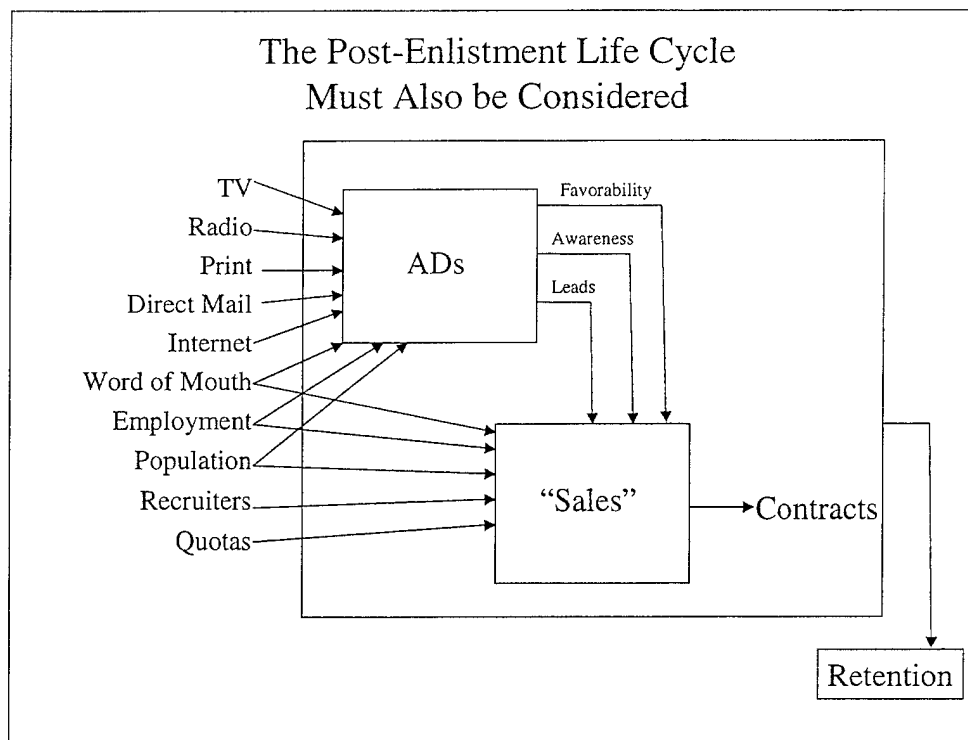
The *black box* in the figure represents two classes of the model, one used exclusively for advertising and one used exclusively for recruitment. No model exists that simultaneously considers the combined effects of advertising and recruitment. While the advertising and the recruitment decision maker may be the same person, he or she does not have the ability to analytically forecast the combined effects of advertising and recruitment resource allocation alternatives and thereby trade off advertising and recruitment dollars.

Opening the Black Box Will Permit Modeling of Combined Advertising/Recruitment Effects



As this second illustration indicates, we want to open the *black box* to allow the decision maker to address the combined effects. This would provide the ability to trade advertising dollars for recruitment dollars and permit better resource allocation across the spectrum of pre-contract activities.

Constructing such a model *is not pushing the state of the methodological art*. In fact, one of our working group's military participants, as part of his dissertation activities, is actually constructing such a model, using data from a recent RAND advertising effectiveness study and recruitment effectiveness data from the Army. *We believe this model shows great promise.*



However, as this third illustration indicates, *contracts* is only one part of the recruiting-retention life cycle. Retention-related measures of effectiveness must also be considered. The goal of the recruiting process is not just to produce accessions that meet the military's physical, moral and quality standards. Rather, it is to produce accessions that meet these standards *and* wish to make the military a career. The decision maker should have the ability to trade off advertising, recruitment and retention dollars. What, for example, is the right mix of advertising, recruitment and retention dollars to promote a twenty percent increase in accessions who successfully complete their first term of service? What is the right advertising/recruitment/retention mix to increase by ten percent the number of accessions who stay for a twenty year career?

Successfully addressing this last question would require simultaneous consideration of the effects of advertising and recruitment today and the effects of retention policies in the future. It would also require reasonably accurate forecasting of demographic and economic trends over the next ten or so years as well as the cumulative effects of advertising campaign alternatives on influencers and future potential recruits. This analytic capability would allow consideration of the impact on future expenditures when making today's resource allocation decisions. The decision maker would have an idea of down the road financial implications of today's dollar allocations.

We recognize that this is a tall order and may prove very difficult to achieve. However, because of the large expenditures associated with promoting mid-career retention, we think it is a worthy goal. Further, trying to achieve this goal has a solid fallback position, namely the ability to address the first question, concerning retention to the end of the first term of service. We have to address the first question in order to address the second, and we believe that the methodology and data currently exist to address the first question.

Advertising: Knowledge-Sharing

- **What knowledge, methods or technology from private sector or sister services can we exploit?**
 - Advertising feedback mechanisms ... off-the-shelf capabilities exist for measuring awareness, attitudes and exposures
 - Exploit Bureau of Labor Statistics DoD-specific information
 - DoD and service-specific knowledge needs to be shared
 - Coordinate commercial research contracts (Yankelovich)
 - Prospect Lifestyle Segmentation Data (Army)
 - ATTS information (Marines)
 - Benchmarks v. civilian sector (how they measure marketing)
 - Understand industry production processes and the role advertising plays in them

We now turn our attention to *knowledge sharing*. We believe that there is much room for improved sharing of data among the military services. The Marines conduct what might be called a mini-Youth Attitude Tracking System (YATS) twice a year, and other services could benefit from this. The Army has a Prospect Lifestyle Segmentation Database which could also be useful to other services.

All the services use commercially available databases. Both the Army and OSD use Yankelovich data, but there is no coordination or the attempt to take advantage of economies of scale in acquiring this data. We think such coordination would be useful, perhaps managed centrally by OSD. OSD could acquire the data and make it available to the services rather than having both OSD and each service buy the data directly...and probably at higher cost. The services would still acquire service-specific data when necessary.

Further, private-sector media-monitoring agencies exist to measure a specific advertising campaign's reach. Among the military organizations represented in the working group, only the Army is currently exploiting this.

One of the working group participants, from a private-sector media-monitoring agency, noted that the Bureau of Labor Statistics provides very good employment-related data, including military-specific information. None of the military organizations represented in the working group was exploiting this data or even aware of its existence.

Finally, and related to the recruiting-retention life cycle modeling activities suggested in previous slides, the private sector has much to offer in the way of its own experiences. How, for example, does the private sector capture the role of advertising in the broader production process? Studying industry's approaches could provide very useful insights.

Advertising: Analytic Approaches

- What are *promising analytical approaches* to improve advertising effectiveness analyses?
 - Economic and statistical methodologies
 - Need good supporting data
 - It probably exists but need to exploit it
 - In combination with efficiency analysis
 - ONDCP Transformation Model
 - RAND Advertising Effectiveness Study
 - Navy's Advertising Effectiveness Study

Analytic approaches exist to relate advertising to the critical measures of effectiveness: contracts, completion of basic and skills training, completion of the first term of service, and completion of a successful military career. The Office of National Drug Control Policy (ONDCP) has developed a model to forecast the effect of advertising expenditure mix on drug usage. RAND has developed an advertising effectiveness methodology, as has the Navy (mentioned earlier).

These methodologies require good supporting data for them to be useful. We believe the data exists today, but the services are not fully exploiting this data's capabilities. This is not because the services don't see the value. Rather it is because they don't have sufficient human resources to fully exploit the data.

Advertising: Summary

- Enhanced communication among military advertising “worker bees”
- Fostered useful interaction between private sector providers and military advertisers
- Advertising and recruiting are part of a larger life-cycle process
- Model the complete personnel life-cycle process and sub-process interactions
- This would not push the “state of the art”
- Quality issues must be considered in models
- Need to more fully share and exploit existing military and commercial data sources

This and the next slide summarize our findings and present recommendations. All working group participants found participation in the working group highly productive. The cross-communication among advertising counterparts in OSD and each military service was very useful and informative. The same is true of the communication between the private sector providers and the military. Indeed, this demonstrates a need for this kind of structured interaction on a recurring basis. We suggest an annual two to three day off-site conference where the services and OSD advertisers and related personnel, as well as their private-sector associates, come together to present briefings on what they are doing that may be of use to their colleagues. The briefings themselves will be useful. But of greater utility will be the cross-fertilization that naturally takes place in such settings.

Working group participants also recognize the importance of considering advertising's role in the broader recruiting-retention life cycle. Previous slides have addressed this point, but we wish to highlight that modeling this broader process is not pushing the state of the modeling art.

However, it is important to consider quality issues when developing such models. High quality, both from the retention and skill perspectives, is an important part of the 21st century military.

Finally, we believe that currently available data, both internal to the military and commercially available, needs to be exploited to a greater extent than is now the case.

Advertising: Recommendations

- **Short Term:**
 - Exploit internet smartly ... and make sure effects can be measured
 - Leverage OSD to focus on image to influencers
 - Exploit data acquisition economies of scale
- **Long Term:**
 - Model the complete personnel life-cycle process so that interactions of stages of the process are considered to support sound policy decisions

We list short term and long term recommendations in this slide. We will highlight two here. The first deals with recent internet experience. Because of early promising experience, we believe the services should aggressively exploit the internet's capabilities. Experience to date shows that the internet can generate leads of high quality with high conversion rates. However, because numbers are small, as the services expand their internet usage, they should do so in a manner that can be evaluated in terms of both conversion rate, contracts *and retention*. As recruiting use of the internet grows, will there be too much *hit redundancy* to sustain the current high conversion rates? Do the high conversion rates lead to soldiers/sailors/airmen who complete their first term of service? Do they lead to soldiers/sailors/airmen who want to make the military a career? These questions need to be addressed as the services' internet usage expands.

The second recommendation is long-term. We believe the services should move to develop analytic tools that permit the modeling of the entire recruiting-retention life cycle so that resource allocation decisions can be made with full understanding of all the near- and far-term implications. Being able to analytically examine the trade-offs between advertising and recruiting dollars, with an understanding of the longer term retention implications, will result in more effective recruiting policy and enhance the quality of resource allocation decisions. Further, the analytic basis should include post-recruitment active duty issues, what we call *retention* in this briefing. For example, what mix of advertising and other recruiting dollars will result in an enlisted force with the highest first term completion rate? What mix would result in the highest rate of enlisteds who make the military a career? While developing the analytic models would not push the state of the modeling art too much, the needed analytic tools do not exist today.

Military Recruiting and Retention for the 21st Century

Working Group 2 RECRUITER EFFECTIVENESS

**Chair: John Noble
Co-Chair: MAJ Neil Fitzpatrick**

This working group focused on the individual (sailor/soldier/airman/marine) recruiter. We specifically discussed how Operations Research (OR) could be applied to improve and enhance the effectiveness of recruiters. We reviewed recent and on-going research in this area, exploring the potential in the continued application of OR methodologies. Our goal was to develop strategies for applying OR techniques and research to improve the effectiveness of recruiters. We approached this as a group project and invited various analysts to present a potpourri of completed, ongoing and proposed research studies. We then discussed the potential of continued and future application of such methods. Our group consisted of both analysts and non-analysts, most of whom had extensive backgrounds in the recruiting process. The presentations emphasized results to inspire thought and discussion.

Recruiter Effectiveness: Working Group Issues

- **Can OR methodologies be applied to improve recruiter effectiveness in the near term/long term?**
- **Do on-going OR studies and analyses provide the solutions to improving recruiter effectiveness?**
- **What promising strategies (analytic methodologies) should be pursued in the future?**

We set out to develop answers to the following three questions: (1) What can be done to improve recruiter effectiveness (near and long term)? (2) Do the ongoing OR studies and analyses provide the solutions to improving recruiter effectiveness? And, (3) What strategies (analytic methodologies) should be pursued in the future that have potential to enhance recruiter effectiveness?

Our focus was not recruiting in the macro sense; but rather on the individual recruiter. Notions such as removing or replacing the recruiter were beyond the scope of our discussions. Supplementing recruiting processes via technology or modifying certain recruiting practices were within the scope. Such proposed changes would need to be supported analytically and the OR methodology may contribute not only to the process but also to the analytic evaluation of the product. For example, if a certain process were to be automated, OR methodologies could contribute to the development of automated process as well as the evaluation of the new recruiting process. Presentations centered around those “concepts” that could be developed into useful products and provided to recruiters. The presentations included market research, market enhancing programs, application of automation/technology, recruiter selection techniques, recruiter training, recruiter evaluation and recruiter support. We limited our discussions to those potential solutions that could be supported analytically, would fit in the context of a military organization and were feasible in terms of cost.

Recruiter Effectiveness: Analytic Presentations

“Possible Solutions”

- **Information solutions**
 - Market analysis studies
 - Historical data - econometrics
- **“Program” solutions**
 - Money for college/enlisted bonuses
 - GED+/College First/Navy College Program
- **Technology Solutions**
 - Computers/communications (ARISS)
 - Internet recruiting (ORS/Cyberspace)

The initial presentation looked at ways to provide recruiter information on the market. This market research approach was based on historical data using econometric modeling. The results tied the market research to the programmatic solutions resulting in the services college funds. Clemson University is providing DoD with an extensive analysis of the market and how the market responds to various college funds (Army College Fund and Navy College Fund). This was followed by several “program solutions” which were aimed at a dominant buying motive of the youth, namely, money for college. These presentations included a look at the Army’s GED+ program. The mechanics of the program were described as well as the program’s potential and method for evaluation by the RAND Corporation. Other proposed “solutions” involved the application of technology. Both the Army and the Navy are applying near-term technology and placing that technology in the hands of the recruiter. The Army Recruiter Information Support System (ARISS) and the Navy’s Technologies Pilot Project were examples presented. The Navy’s project, provided recruiters with existing technology (laptops, cell phones, fax machines, etc.) to aid the recruiting process in a pilot project. More far reaching technologies were discussed as part of the Military Entrance Processing Command’s effort to create a virtual recruiting environment (referred to as REMOTE) and launch a Cyber-Space recruiting station at a headquarters’ location. The long range idea is to employ OR methodologies to create an On-Line Recruiting Station (ORS).

Recruiter Effectiveness: Analytic Presentations

...More Analysis ...More Possible Solutions

- **Modeling solutions**
 - Placing the “right” number of recruiters in the “right” location (on-going modeling project)
- **Humanistic solutions**
 - Expand/update research on recruiter selection, training and evaluation (proposed study)
 - Outsourcing (outbound -telemarketing project)
 - Recruiter incentives (study in progress)
- **Organizational solutions**
 - Improving responsiveness of “personnel system” to produce recruiters (on-going analysis)

Presenters considered other OR applications as part of a “modeling solution” to enhance recruiter effectiveness. This included the DoD sponsored work at the Naval Postgraduate School (NPS) on Recruiter Station Location. The notion is to build on the market research data and place the “right number of recruiters” into the “right locations.”

Turning to a more humanistic approach, NPRDC presented its plans to conduct a comprehensive analysis of recruiter selection, training and evaluation. This was complemented by the results of the Army’s outbound telemarketing pilot project. The goal of the outbound telemarketing was to relieve recruiters of the task of “cold-call prospecting.” The group also examined the emerging results of a recruiter incentive study under the direction of NPS. This study used analytic techniques to determine the strength of various incentives used by the Army to motivate its recruiters.

In a final presentation, the Air Force presented a potential “organizational solution” based on its analysis of its personnel organization system’s response to changing demands for recruiters. The discussion centered on ways OR techniques could be used to better manage the build up and draw down of recruiters. Understanding these relationships is key in managing the number of recruiters in an environment of changing requirements.

Recruiter Effectiveness: Our Conclusions

- Current OR analytic efforts, while useful, provide only marginal gains to overall Recruiter Effectiveness
- Greater recruiter effectiveness would likely be achieved if the recruiters had better “corporate” support
(Note: this “basic life support package” is more than mere QOL niceties and includes adjustments to incremental pay for recruiting, housing allowances, supplemental health care, personnel and pay adjustments, etc.)
- OR/analytic methods could play a key role in developing, justifying and evaluating required “corporate” support
 - Evaluating impacts of implementing changes
 - Performing a cost-benefit analysis

The group’s conclusion resulting from the syntheses of the presentations was that the current OR analytic efforts, while useful, provide only partial solutions and achieve only marginal gains to overall recruiter effectiveness.

While the group believed that all the presentations provided insight to the problem and partial solutions, greater recruiter effectiveness would likely be achieved if the recruiters had better “corporate” support. This idea was expounded upon by the actual recruiters participating in the group. They believed that this “corporate support” is much more than a Quality Of Life (QOL) issue. The group discussed a “basic life support package” that would include such items as special adjustments to incremental pay for recruiters (i.e. sea pay), more realistic housing allowances for high cost areas, supplemental health care in areas not supported by TRICARE, and other personnel and pay adjustments. It was a commonly held belief in the group that OR analytic methods could play a key role in developing, justifying and evaluating these “corporate support” packages and include: (1) evaluating impacts of implementing changes; and, (2) performing a cost-benefit analysis to determine return on investment.

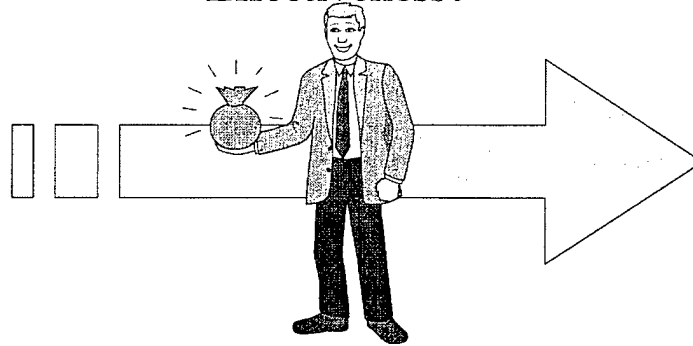
Recruiter Effectiveness: Our Bottom Line

For Recruiters to become more effective Recruiting Duty must become a core component of military career progression.

Note: This is a significant cultural change for most services!

As the group's discussions concluded, we developed our "bottom line" conclusion. We viewed the current recruiting and retention problems the military services are experiencing as symptoms of a deeper organizational disease; treating the symptoms will continue to provide only marginal results. However, since we were charged with recommending something that would have the greatest impact on recruiter effectiveness, notwithstanding our national policy of increasing deployments coupled with the erosion of military benefits, we recognized recruiting will continue to be difficult. It will be extremely difficult to continue to attract and retain high performing individuals for our force of the 21st century. To accomplish this vital mission, however, the military services must place a higher value on recruiting duty. Recruiting duty then becomes the mission of all servicemembers and it is a central part of a servicemember's career. Our hypothesis, which needs further study, is that recruiters will be more effective when an assignment to recruiting duty becomes a core component of military career progression. This would represent a significant cultural change for most of the services.

Will OR Methodologies Help Recruiter Effectiveness?



Yes, but there are no Silver Bullets

To this end OR methodologies can help. But there are no “silver bullets” or “magic beans” that will resolve our current recruiting and retention situation without significant changes. The following slides show some potential areas for the application of OR methodologies, including: (1) selecting recruiters; (2) training recruiters; (3) providing tools and technologies for recruiters; and, (4) restructuring recruiter incentives. For each area, the information presented covers areas to develop, topics to pursue and potential for analysis.

Recruiter Effectiveness: Application of OR Methodologies

- **Selecting recruiters**
 - Develop
 - Sound analytic selection methods
 - Pursue
 - Proposed/planned analytic research
 - Analyze
 - Results of pilot projects

Selecting Recruiters: There is a definite need to revisit and develop recruiter selection techniques. The selection criteria need to be founded in sound analytic methods. The current method in which recruiters are selected can be improved by developing innovative screening methods. This screening also has potential to assist in training recruiters.

We recommend pursuing the proposed research by the Navy and the Air Force in this area. Analysis of data from those pilot projects could lead to overall better selection of sailors/soldiers/airmen/marines for recruiting duty. Coupled with recruiting duty becoming a core component of military career progression, this may aid in getting the military's brightest and best to pursue recruiting duty.

Recruiter Effectiveness: Application of OR Methodologies

- **Training recruiters**
 - Develop
 - On-line training capability
 - Proper training courses for new technology
 - Pursue
 - Teaming with proven industry experts
 - Analyze
 - Modular training techniques

Training Recruiters: We see a need to develop an on-line training capability. This could include providing recruiters with a real-time access to up-to-date training information. Using the technology already in place, there is a need to develop user friendly online tutorials that cover both recruiting processes as well as the use of the technology. This training could leverage current video-teleconferencing capabilities. There could be potential to team with industry in the training area to capitalize on lessons learned.

Several pilot studies demonstrated that technology without proper training does not assist the recruiting effort. As technological solutions are fielded, they must include sufficient training packages.

We recommend pursuing training techniques proven by industry to be successful in this area. Analysis of those training techniques and their application to a military environment is essential. This analysis could focus on the development of modular exportable training packages.

Recruiter Effectiveness: Application of OR Methodologies

- **Providing tools and technology to recruiters**
 - Develop
 - Processes for integrated data flow (electronic) from recruiter to the military personnel system
 - Pursue
 - Leverage existing COTS automation capabilities
 - Experimentation with “virtual” recruiting schemes via the internet
 - Joint market analysis initiatives to expand markets (i.e., college lists)
 - Analyze
 - New telemarketing strategies
 - Recruiter incentives systems

Providing tools and technology to recruiters: First, we recommend the continued development and application of OR techniques to the business processes of recruiting. OR technologies could be applied to enhance the process for an integrated and seamless data flow (electronic) from recruiter through the Military Entrance Processing Stations (MEPS) into the military personnel system. In pursuing this, we believe it is possible to leverage existing Commercial Off-The-Shelf (COTS) technology to develop this automated capability.

We recommend the continued application of OR technology in the experimentation on “virtual” recruiting schemes via the internet. This is an area that has great potential for expansion.

We recommend leveraging technology in Joint market analysis initiatives in an effort to expand markets (i.e., college lists). We recommend further analysis and study of telemarketing strategies as initially pursued by the Army.

Finally we believe that OR methods could be applied to develop a model addressing recruiter incentives. These models have potential to enhance recruiter production.

Recruiter Effectiveness: Application of OR Methodologies

- **Restructuring recruiter incentives**
 - Develop
 - Personnel systems that make recruiting career-enhancing
 - Reward systems to stimulate production vice current system that controls production
 - Pursue
 - Research into effectiveness of incentive programs for recruiters
 - Research on alternative methods to determine goals
 - Analyze
 - Methods that tie to productivity/effectiveness
 - Goaling/production systems

Restructuring recruiter incentives: As mentioned on the previous slide, we see a need to develop new models that provide real incentives for recruiters to increase production. Tied to this is an analysis of the overall personnel system. It is key that the personnel system rewards recruiting duty and makes recruiting duty career-enhancing. Reward systems must stimulate production rather than control production. To that end, we recommend the application of OR technologies to pursue research into effectiveness of current incentive programs for recruiters and development of alternative methods to determine goals. Analysis could focus on methods that tie to productivity and effectiveness as well as balance goaling and production.

Military Recruiting and Retention for the 21st Century

Working Group 3 DEMOGRAPHICS / PSYCHOGRAPHICS

Chair: Hugh Dempsey
Co-chair: Dr Naomi Verdugo
Co-chair: CPT Tony Perry

This working group focused on “How effective is demographics/psychographics in identifying the target market?” The basic answer to the question is that we are very effective. However, there are areas where the tools of demography can be used more effectively. For example, there is room for improvements in Joint research, operations, task organization and strategic policy decisions. Our working group also focused on demographic and psychographic research and the implications of findings for improving recruiting and retention programs.

We want to thank Dr Naomi Verdugo, a co-chair, who, unfortunately, was unable to attend the Mini-Symposium.

Demographics/Psychographics: Presentations

Topics covered

- State of the market, LTC Hoscheit, USAREC
- Youth labor force of 21st Century, Dr Thomas, NPS
- Generation Xers and youth: Implications for recruiting, Dr Bersoff, Yankelovich Partners
- Army recruiting: Outlook and initiatives, Dr Orvis, RAND
- Wise up to teens, Mr Wood, Teenage Research Unlimited
- Partners in education, Dr Zeman, USN

To provide a perspective of demographic and psychographic research for discussion, the presentations listed were shared with our working group. These covered the state of the market — from the Army viewpoint; the youth labor force of the 21st century; Generations Xers and Youth, a broad overview of the youth market; Army recruiting outlook and initiatives; Wise Up to Teens, a fine-toothed look at the youth market 12-17; and Partners in Education: The analysis supporting the Navy College Program.

The Navy College Program, in particular, is a very exciting concept with great potential for both recruiting and retention. The Navy has created a program whereby all of their training and military education is assigned an appropriate amount of accredited college credit and applied to each sailor's college records. For example, upon graduation from Boot Camp, each sailor receives a transcript showing three college credits. During a four-year enlistment, a sailor can expect to complete about 60 hours of credit and receive an Associate's Degree. This is a much simpler process than its predecessor; where a sailor had to get records, have them evaluated, and see if a college would accept them. This is a more comprehensive idea than the Air Force Community College; a Chief Petty Officer received 140 credit hours and a Bachelor's degree for the training received during his career.

Demographics/Psychographics: Critical Factors

- Continue evaluation to keep what's working and change what's not
- Know your total audience ... work with, not against

These are general observations about the critical factors that need to be considered for analyses to be useful and relevant. First, we need to continually experiment with new concepts and incentive measures and adopt the ones that work. But we need to continue evaluating the adopted incentives to see if they are still effective. For example, the Army College Fund was our pride and joy, but its effectiveness has eroded over time as college costs increased and industry adopted similar programs. The program should have been upgraded or dropped as it lost effectiveness.

Second, know your audience. What appeals to the potential recruit? Patriotism was mentioned a number of times during the Mini-Symposium. Patriotism is a hot spot for most people in attendance; we have devoted our lives to national service. But, is it a hot spot to the youth we are trying to recruit? To fill roughly 350,000 recruit slots each year, we must reach not only the propensed youth, but also reach down into the negatively propensed youth. Is patriotism a hot spot for the negatively propensed? We have to better understand attitudes in order to recruit youth for military service.

Demographics/Psychographics: Current Analytic Capability

- **Strengths**
 - Technology
 - Data is currently available
- **Limitations**
 - Manpower
 - Timeliness of data

Our current ability to address specific issues is pretty good. Our strengths are that we have the technology, and that data exist. Our limitations are that we need more manpower for analysis and the data we use could be more timely.

But our working group discussed many analysis-related initiatives that could improve our ability to contribute to more effective recruiting. These initiatives are described on the following three slides.

Demographics/Psychographics: Analysis-Related Initiatives

- Create a common definition of generations
 - Different speakers used different age groups to define generations, even when the same name was used
 - This can cause confusion and hinder communication and cooperative and comparative research
- Define future requirements and translate them into current recruiting goals
 - Does the market support the product?
- Determine best way to conduct market segmentation
 - Understand attitudes, lifestyle segmentation, behaviors

First, we need to generate common terms. During this mini-symposium, some speakers would use the same term to define different age groups. It is difficult to aggregate and compare data when the data are grouped using different definitions. Decision makers will remember the generational names and important data associated with that generation. But if different analysts brief psychographic information for a given generation using different names, the decision maker may be confused or even ignore the analysis.

What is our "recruit product?" Does it match future requirements? We have heard about the 95-man destroyer. Is the sailor we are recruiting today capable of manning the multi-mode workstation of the future and performing tasks of many different ratings? Is the recruit of today correct for the NCO of tomorrow? In TRADOC, developers of the Army After Next Program said, "We'll have to field this with all Category 1 soldiers." After USAREC briefed the developers on the available personnel market, they went back to the drawing board.

Also, market segmentation is important. The Army has a detailed market segmentation program. They are able to tell the profile of the youth that are most likely to enlist, the radio stations they listen to, and the television stations they watch. Focusing on this data can reinforce reaching markets where we have been successful but not the markets we are missing. What are the characteristics of the youth we are not enlisting? How do we influence them into enlisting? And, for both the youth groups we are enlisting and those we currently are not, what is the expected propensity to reenlist at the first flow point?

Demographics/Psychographics: Analysis-Related Initiatives (Continued)

- Reexamine definition of our target market
 - Unemployed
 - What is our competitive advantage and how can we leverage it?
 - Missing populations
 - Circular definition

We are told the American economy is great. As the working group discussed, it's not all great; the average is great. The joke is that if my neighbor is out of work, it's a recession. But if I'm out of work, it's a depression. There are pockets of high unemployment around the nation. What are we doing to reach those pockets? One test program being carried out by USAREC and employment offices in South Carolina where the unemployed are advised about their opportunities for Army service. Other states are displaying an interest in this effort.

Also, missing populations, which include the homeless, the migrant worker, the frequent mover, should be considered. Some people say that there are small numbers in these groups, but they may be significant. For example, the Democratic Party wants to increase the census by millions to reflect the people missed by conventional sampling procedures because they believe that enough people are missed to completely change the nature of Congress. The military are not reaching these "missing populations" and making them aware of opportunities for military service.

To a degree, the approach to defining the target in recruiting is circular. "These attributes define the persons who join the services, so let's find these people, determine their hot buttons, and recruit more of these people that WE ALLOW to join the military." We look at what we get and try to get more of the same. We defined quality marks for recruiting to reduce disciplinary problems. Many of the people we currently won't allow to join the military may, in fact, make good troops. If we bring in more GED soldiers, disciplinary problems may increase and we may eliminate those who are not fit for the military through attrition, but we would have increased the target market and recruited more people. The longer-term, and possible negative, impact of this also needs further study.

Demographics/Psychographics: Analysis-Related Initiatives (Continued)

- Make the decision makers aware that there is no easy immediate solution
 - We are examining issues which change slowly over time

We need to identify those people who would make good soldiers but who are being filtered out by our current screening policies, such as the homeless, the poor, the migrant worker, the people not being reached by our advertising and those without an influencer with military knowledge. These are the people that may need an opportunity to better themselves that military service can provide. How do we get the message to these people? We need to experiment with different approaches to determine how to reach these potential recruits and their influencers.

Finally, we must ensure that the decision makers realize that there is no analytical silver bullet that will fix the situation immediately. Speakers were asked a number of times, "What will this study do for me now?" The answer is that the mini-symposium was not intended to develop an immediate solution. Our goal at the mini-symposium was to create a plan for developing tools, studies, etc. that we can use to help the decision makers wrestle with these complex problems.

Demographics/Psychographics: Program Initiatives

- Target audience earlier
- Address/reverse benefit erosion
 - Perceptions of eroded benefits on recruiting accessions

In addition to analysis-related initiatives, our working group discussed program initiatives that are needed to improve recruiting effectiveness. First, we need to lay the ground work during middle school years and follow up in high school. Values, duty, citizenship, patriotism are subjects not being stressed in many schools. Community involvement by installations, expansion of the JROTC, and increased visibility of the services are some things that might help.

Admiral Tracey mentioned that service members are more highly involved and concerned with the family than in past generations. This might be a result of benefit erosion. In the past, with government housing, furniture and medical care, if a service member were suddenly deployed, he could be sure that his family would be taken care of. The services had a saying, "We take care of our own." If a family emergency arose, the service member was confident that a military representative would step in and help the family. Then as a benefit erosion occurred, the service member was told, "You're responsible for your family, your life, your career, etc. We're not going to hold your hand. Life is not fair." Now, the member worries about Tri-Care, dental problems, food stamps, decent safe affordable housing, etc. The erosion of benefits has eroded readiness as soldiers must worry about their families and how they will survive instead on concentrating on the mission. Repeated frequent deployments exposing the families to repeated frequent dangers induce the member to leave the service.

Demographics/Psychographics: Program Initiatives (Continued)

- Present a coordinated joint recruiting message

We also need joint coordination of our recruiting message. Currently, our recruiters compete against each other. The youth see: GO Army, GO Navy, GO Air Force, GO Army National Guard, etc. These are viewed as separate agencies vying with colleges and industry for their service. Advertising reinforcement is a great marketing tool. We suggest that each service ad begin with a joint recruiting message selling the point that the military lifestyle is a desirable lifestyle. Then it continues with a service specific ad. Seeing a Marine Corp ad twice is not likely to make someone leaning to the Air Force to enlist in the Marines, but the joint recruiting message in that Marine ad might be enough to move the tentative recruit into the committed column. This would work to the benefit of all of the services as the message of the desirability of military service sinks into the market.

Demographics/Psychographics: Knowledge Sharing

- Include best (better) practices
 - College transcripts for completed training
- Maintain current demographic data
 - Empowerment and customer satisfaction
 - Easy access to information about the military profession on the internet

To accomplish the analysis and program initiative, we have to do more than maintain demographic data — we have to share it between the services. We also have to experiment continually to see how different market segments react to differing recruitment techniques. Psychographics are continually shifting and our recruiting techniques need to keep pace.

One example of sharing a better practice would be to create an Army College Program similar to the Navy's, where each soldier is issued a college transcript after each training phase. The Air Force has a similar program, but it's limited to the community college level, while the Navy program goes to the baccalaureate degree. The Department of Defense should consider creating one college program for all of the services.

Maintaining current demographic/psychographic data and using it for program decisions is important. For example, one of the traits of the youth market is empowerment. They want to feel that they are in control. Images of a Drill Sergeant in their faces, from movies such as *Full Metal Jacket* and *GI Jane*, make them think that they are losing power if they join the military. But the establishment thinks that the Drill Sergeant is making them into better persons, thereby increasing their power. We're not saying to weaken the Drill Sergeants, but to present them as a positive factor instead of a boogey man.

Also, the youth market has a lust for information, but they want it satisfied NOW. Web sites must display rapidly or the youth will click onto another site. Attractive graphics are important, but speed is vital. Sacrifice fancy graphics for speedy information.

Demographics/Psychographics: Needed Research

- Better determine who we are trying to recruit
 - Define quality recruit
 - Define quality soldier
- Expand on current segmentation work
 - Expand throughout DoD
 - Incorporate more psychographic information
- Better understand effects of incentives
 - Retention and recruiting of GED recruits
- Better understand how values shape individual behaviors

Research is needed in several areas. Who are we trying to recruit? From our briefings, it seems that we're trying to recruit more of what we've been recruiting, but we want to get better at it. I'm not sure that is the best approach. Maybe that market is played out. Although not as fertile a field, maybe we need to target other markets. Look at the unemployed. Look at the homeless. Look for those markets that produce few, but good, soldiers. If we can irrigate these deserts, we may increase our overall crop.

Let's expand on the market segmentation work and use it throughout DoD in a joint effort. There is no reason to pay a vendor twice for virtually the same information. Each service may want some unique information, but most of the desired information is the same. Coordination would allow the services to obtain and share the same data while saving money.

We also need to examine the effect of enlistment incentives on GED soldiers. Currently barred from enlistment incentives because of their higher attrition and disciplinary rates, we need to consider that this may be a self-fulfilling prophecy. Maybe their higher attrition rate is exacerbated by the lack of a college fund or enlistment bonus. The Army's GED+ experiment will look at that idea.

The values of today's youth are not ours, and our values are not theirs. We must sell the services in terms of the youth's values. Then during training and their first enlistment, we must instill the spirit of a warrior (current military values) in that recruit. We must experiment to determine which segments are responsive to a patriotic approach and which are not.

Demographics/Psychographics: Needed Research (Continued)

- Continued funding of demographic/psychographic research
 - Need to continually update; old data are usually outdated data
- Exploit current knowledge base
 - Educate DoD/service leadership
 - Institutionalize the planning process

In addition to specific research efforts, we need a research program. To quote Damon Wayans, "Mo' money, mo' money, mo' money!" We need to fund research into recruiting related areas and to sustain those efforts. The purpose of this research is not to determine a law of nature, but to measure the current state of the market population and to determine the most effective ways of marketing to them. Over time, the market parameters drift, the market becomes inured to our message, the competition adopts our tactics, and the effectiveness of incentives is eroded.

Terminating a demographic research project when it is finished is short-sighted. We must repeat the experiment periodically to confirm that its findings are still valid. As the findings become invalid, we must determine how to insert new conditions that refresh the old technique or we must discard the old technique in favor of some new, but tested, technique. We must keep this research program active; it will take a couple of years to perform an experiment on differing incentives and to determine the most effective mix. Waiting until recruiting is in trouble and then initiating research dooms us to two or three years of poor performance while we modify our recruiting process to align with the current state of the market.

Finally we need to take advantage of our current knowledge base. "Educate the Leadership" is probably too strong, but we do need to inform them of what knowledge we have about the market and what we know. We need to make the planning process more constant and provide funding early. When we provide advertising money late in the FY, we have to take leftover space and pay higher for it. An analogy: when you catch a plane at the last minute, you usually have to pay full price; however, if you reserved the seat well in advance, you could get a discount. Last minute changing the mission, changing the funding, changing the process, cause our recruiting commands to react and perform inefficiently.

Military Recruiting and Retention for the 21st Century

Composite Group 2 RETENTION

Chair: Dr Al Robbert
Co-Chair: LtCol Jeff Perry
Co-Chair: Mr Pat Crouse

The objective of the retention composite group sessions was to provide several perspectives on the current status of retention. These sessions included the three presentations: a panel of OSD and service headquarters retention staff representatives, a panel of senior enlisted representatives and a Joint Staff perspective.

Retention: OSD and Service Headquarters Staff Perspectives

- Current retention trends
 - LTC Jeff Perry (OSD)
 - SGM Jerry Pionk (Army)
 - CDR Dave Caldwell (Navy)
 - LtCol Jan Middleton (Air Force)
 - Maj Cheryl Fitzgerald (Marine Corps)
 - LCDR Wes Pulver (Coast Guard)

The purpose of this panel was to provide an overview of current retention trends. OSD's standard aggregate retention tracking statistics were presented, with amplifying remarks provided by retention Offices of Primary Responsibility (OPRs) from the headquarters staffs of the Army, Navy, Air Force, Marine Corps and Coast Guard. Panel members included LTC Jeff Perry (OSD), SGM Jerry Pionk (Army), CDR Dave Caldwell (Navy), LtCol Jan Middleton (Air Force), Maj Cheryl Fitzgerald (Marine Corps) and LCDR Wes Pulver (Coast Guard).

Retention: OSD and Service Headquarters Staff Perspectives (cont.)

- Current retention assessments
 - Army, Marine Corps, Coast Guard meeting aggregate goals
 - Navy, Air Force not meeting aggregate goals
 - All services missing goals in high-tech, highly transferable skills
- Apparent incongruity: aggregate retention not as bad as some general characterizations suggest

The purpose of this panel was to provide an overview of current retention trends. OSD's standard aggregate retention tracking statistics were presented, with amplifying remarks provided by retention OPRs from the headquarters staffs of the Army, Navy, Air Force, Marine Corps and Coast Guard.

The data show that, in the aggregate, the Army, Marine Corps and Coast Guard are meeting their retention goals, while the Air Force and the Navy are each missing some or all of their goals. Moreover, each of the services is missing goals in selected skills, particularly high-tech skills that are in high demand in the private sector.

The data stand somewhat in contrast to generalizations of current retention trends offered by senior human resource managers in OSD. The military retention outlook is typically characterized as poor. As the data indicate, however, retention is not universally poor. It may be poor in some critical areas, but it is adequate in others.

Retention: Senior Enlisted Representatives' Perspectives

- Panel included top enlisted representatives
 - CSM Dennis Webster (Army)
 - MCPO Mike Doyle (Navy)
 - MSgt Tony Patterson (Air Force)
 - SGM David Petrovice (Marine Corps)
 - MCPO Michael Dyer (Coast Guard)

This panel consisted of senior enlisted personnel selected by the top enlisted advisors on each of the five military services' staffs (Sergeant Major of the Army, Chief Master Sergeant of the Air Force, etc.). The panel members, who generally hold top enlisted positions in major field commands, included CSM Dennis Webster (Army), MCPO Mike Doyle (Navy), MSgt Tony Patterson (Air Force), SGM David Petrovice (Marine Corps) and MCPO Michael Dyer (Coast Guard).

Retention: Senior Enlisted Representatives' Perspectives (cont.)

- Similar units obtain varying retention outcomes
 - Function of leadership (genuine “feeding and caring” of the troops)
- Some deployment is good, too much is not good
- Job satisfaction is a factor
 - Example: unlike DoD services which are adjusting to post-Cold War mission changes, the Coast Guard mission remains unchanged, continues to be highly rewarding, and fosters high retention
- Spares and other resource shortages causing “professional frustration”
- Some senior officers, enlisted personnel “not having fun anymore”— affects outlook and retention of younger troops

This panel consisted of senior enlisted personnel selected by the top enlisted advisors on each of the five military services' staffs (Sergeant Major of the Army, Chief Master Sergeant of the Air Force, etc.).

The strongest perspective delivered by this group was that leadership is a major factor in retention. Several panelists cited their personal knowledge of identically equipped units, stationed at the same installation, with similar deployment histories, yet with radically different retention outcomes. They attributed the difference in outcomes to the quality of leadership exhibited by the officers and senior enlisted members of the units. In this context, the operative element of leadership thought to make a difference in retention outcomes is genuine “care and feeding” of the troops — taking an interest in and seeing to the welfare of individual members of the units.

Members of the panel pointed to other retention factors that are visible to those in close proximity to the troops, but not necessarily measured or captured in service data bases. Some of these are listed on the slide.

Retention: Joint Staff Outlook

Brig Gen Pat Adams, J1

- Why the Joint Chiefs changed their perspective on personnel readiness
 - Change in chairmanship
 - Early signs of eroding quality and experience
- J1's message: "Houston, we have a problem."
- Outcome: Joint Chiefs' support for triad of compensation enhancements
 - Reverse pay gap growth
 - Restore lost retirement benefits
 - Reform pay table

About a year ago, the Joint Chiefs of Staff, in their testimonies before Congress, dramatically reversed their assessments of personnel readiness. They replaced a sanguine outlook with one that was much more guarded, more respectful of the risks associated with the potential erosion of quality and experience levels in the services.

BrigGen Adams, Director of Manpower and Personnel (J1) on the Joint Staff, described the antecedents of that change in outlook and presented a briefing containing the data to which the Joint Chiefs reacted in reformulating their assessments. BrigGen Adams said that a large part of the changed outlook could be attributed to Gen Shelton's appointment as Chairman. Gen Shelton's extensive background in field commands made him very sensitive to troop-related issues such as recruiting and retention. Additionally, in internal Joint Staff deliberations, the J1 highlighted early signs of quality and experience erosion that would potentially threaten the viability of Joint Vision 2010 — the Joint Staff's vision of how U.S. forces would wage war in the early part of the coming millennium.

As a result of Gen Shelton's concern, the J1 developed a more extensive briefing on the subject, much of which is captured in BrigGen Adams' briefing at this Mini-Symposium. The catch phrase of the briefing was "Houston . . . we have a problem."

The briefing convinced the Joint Chiefs to argue for the triad of compensation enhancements: reverse pay gap growth, restore lost retirement benefits and reform the pay table.

Retention: Broad Themes From Working Group Deliberations

- Objectives are soft
- Analysis must be at an occupational level
- Key independent variables are not well defined or measured
- Retention-focused resources have atrophied during the drawdown

On this slide, we summarize four themes that emerged from the deliberations of the three retention working groups.

First, retention objectives are soft. The services' aggregate retention objectives appear to be rational in that the Air Force, with its high-tech mission, demands higher retention, the Marines, with their emphasis on youth and vigor, demand lower retention, and the other services fall between. However, these objectives are based on very subjective impressions of how much experience is required for the services to effectively perform their missions.

Second, a more analytically rigorous sense of retention objectives must be built from the bottom up — analyzing the needs of each occupation and summing across occupations to determine aggregate needs. Occupational-level analysis is important but, unfortunately, requires work at a level of detail that is difficult and painful for thinly staffed force structure analysts and planners.

Third, many of the key independent variables that influence retention are not well defined or measured. Compensation is both well defined and well measured; hence, it is well studied. Tempo is defined but not well measured. Quality of life is neither well defined nor well measured. Leadership is defined in the dictionary but is difficult to capture (measure) in a way that can be entered into multivariate analysis of retention influences.

Finally, retention-focused resources have atrophied during the drawdown of military service strengths. Retention management staffs, service retention infrastructures, analytic staffs devoted to retention issues, and retention-related research funding are generally well below levels prevailing before the drawdown.

More specific observations from the three retention working groups are included in their sections of this report.

Military Recruiting and Retention for the 21st Century

Working Group 4 SCREENING, SELECTION, ATTRITION, RETENTION

**Chair: Larry Looper
Co-Chair: Don Whitfield**

This working group explored several different issues related to screening, selection, attrition and retention. Specifically, we focused on the retention programs available in each military service, management of personnel in the Delayed Enlistment Program (DEP), reasons why recruits attrit from the DEP or very early in their military career, smoking and early attrition, the development of an attrition tracking system, and the use of a personality screening instrument to reduce early attrition. We want to emphasize, as others have, that retention and attrition are closely related to how well the force structuring and recruiting jobs are accomplished. Retaining better people in the right numbers will help reduce the recruiting problem, and the reverse is also true. Although each working group in this Mini-Symposium was separate, we know there was considerable overlap in topics discussed. We believe this is beneficial as repetition is a key to learning and to action.

We want to thank Don Whitfield, a Co-Chair, who, unfortunately, was unable to attend the Mini-Symposium. We especially want to thank two members of our working group, Master Chief Mike Doyle and LT Danielle Ryan, who helped put this briefing together.

Screening, Selection, Attrition, Retention: Out of the Box Initiatives

- **Make 1st term last 20 years**
- **Turn pay table upside down**
- **Pay recruiters a bounty**
- **Make everybody an officer**

Before looking at the specifics of the presentations made in our working group, let me summarize our discussions with four slightly less-than-serious recommendations — what we call “Out of the Box” initiatives. If you made the 1st term of enlistment last 20 years, that would certainly solve any problems with 1st term reenlistment — there would be no need for any reenlistment program! A second initiative is to turn the military pay table upside down. This would pay E-1’s the greatest amount of money and pay would be reduced as members progressed through a career. This initiative would help create more vacancies in higher grades and aid in promotions. A third initiative would be to pay recruiters a bounty for each recruit. Such a move would probably be effective in increasing the numbers but might have a negative effect on quality! A final out of the box initiative is to make everyone who enlists an officer. Well, you might say that some of these initiatives could have problems getting through Congress and the service’s recruiting commands, so let’s begin now to look at initiatives which fit a little more in the box by looking at what was discussed in our working group sessions.

Screening, Selection, Attrition, Retention: Presenters and Topics

Army Attrition Overview (Ron Canada, PERSCOM)

Overview of Army retention programs

- 74% of Army personnel now in CONUS resulting in numerous deployments
- Retention high overseas
- Army needs MOS level model to manage retention

Reasons for Attrition: In-Depth Interviews (Dr Martin Walker, TRADOC)

- Organizations need some turnover...How much is enough?
- 3-part attrition study: data analysis, interviews and survey
- Main causes: undisclosed medical conditions, fitness problems and communication

Ron Canada from Army PERSCOM began our presentations by giving an overview of the Army's retention situation and programs. In total, Army retention goals for this fiscal year will be met, but, as usual, the devil is in the details. Retention in high-tech occupations is still lagging. Obviously, civilian opportunities and OPSTEMPO are two of the primary reasons. Seventy-four percent of Army personnel are now in CONUS, putting a great strain on filling our overseas requirements. When personnel are assigned overseas, retention is high, indicating that fulfilling a meaningful mission is critical to job satisfaction and retention. Mr Canada also indicated that the Army needs an Military Occupation Specialty (MOS)-level retention management model to complement total force retention programs.

Dr Martin Walker from TRADOC presented results from his three-phase study of early Army attrition. He raised the question of how much attrition is "good" for the Army and the need to study this issue in some detail. His three-phase study involved traditional statistical modeling of attrition, in-depth interviews of attritees, and a survey. The primary causes he found for early attrition included undisclosed medical conditions, problems with physical fitness, and poor communication between recruiters and recruits about basic training.

Screening, Selection, Attrition, Retention: Presenters and Topics (cont.)

DEP Management Model (MAJ John Jessup, USAREC)

- Model uses variable interaction to identify key factors
- Test data show high risk recruits attrit at over 90%
- Difficult to use model to screen out potential DEP losses

DEP Management (Mr Don Bohn, Navy Recruiting)

- Overview of Navy recruiting and DEP management
- Active management of DEP: knowledge of Navy and fitness
- Other DEP management initiatives

Major John Jessup from Army Recruiting discussed his DEP attrition prediction model. It uses a statistical variable interaction scheme to identify recruits most likely to early attrit. Test data from the model show that high risk recruits (as identified by his model) attritted at over a 90% rate. However, he recommended that his model not be used to actually deny enlistment to selected potential recruits since many of the factors shown to be statistically significant in attrition prediction are sensitive demographic factors.

Don Bohn continued our discussion of DEP management with an overview of Navy recruiting and DEP programs. He indicated that the Navy has a very active program to manage and encourage people in the DEP to include tests of knowledge about the Navy and physical fitness. Successful completion of the tests can result in promotion to E-2 during basic. Don also discussed several other DEP management initiatives. Several of these are incorporated in our recommendations upcoming in a few slides.

Screening, Selection, Attrition, Retention: Presenters and Topics (cont.)

Navy Bootcamp Attrition; Smoking and Attrition (Dr Aline Quester, CNA)

- Youth smoking on the increase — about 30%
- Smokers attrit in basic training at 2 times that of nonsmokers
- Can't screen out smokers; must ensure they are not discriminated against

In a very provocative presentation, Dr Aline Quester of the Center for Naval Analysis (CNA), discussed her work exploring the relationship between pre-service smoking behavior and attrition. She stated that even with all the information about the potential harm of smoking, youth smoking in this country is on the increase. This increase is also being seen in new recruits coming into the military. She found that in the Navy, smokers attrit at a rate twice that of non-smokers, and that this impact held up in her multivariate analysis controlling for other demographic factors. However, with over 30% of America's recruit-age population smoking, the services cannot reject smokers. In fact, she postulated that the services' policy of nonsmoking during basic training may have much to do with increases in early training attrition, and that research should be conducted into the possible retention effects of allowing smoking or encouraging recruits to stop through the use of patches or gum. (Note: Such an analysis is almost certainly extensible to other factors. It should be useful as the framework for addressing causal factors in early attrition by non-smokers as well.)

Screening, Selection, Attrition, Retention: Presenters and Topics (cont.)

Enlisted Retention and Attrition Tracking Database (LT Danielle Ryan, CPF/CLF and Master Chief Mike Doyle, NCCM(SW))

- Development and use of enlisted retention and attrition database
- Identifies attrition by unit, ship, demographics, occupation, location, etc.
- Potential for use in SRB management & recruiting; cohort analysis capability still needed

LT Danielle Ryan and Master Chief Mike Doyle presented their work to develop and use an enlisted retention and attrition data base and tracking system. The system, updated from enlisted database personnel files, can measure and track retention and attrition by a large number of institutional and demographic factors, including unit, ship, rating, location, gender, etc. They believe that such a system would be very useful for all services as it has great potential for use in Selective Reenlistment Bonus (SRB) and retention program management. Currently, the data base is time-period transaction based, and they are hoping to eventually be able to track the retention and attrition behavior of enlisted cohorts in the system by Navy Enlisted Classification (NEC) to be used for sub-specialty recruiting and career development analysis.

Screening, Selection, Attrition, Retention: Presenters and Topics (cont.)

Assessment of Individual Motivation and GED Plus Project (Dr Mark Young, US Army Research Inst.)

- Development and use of personality assessment instrument to predict attrition
- Low Assessment of Individual Motivation (AIM) scores appear related to higher attrition
- Test implementation under way; part of GED-Plus screening criteria

Our final working group presentation was from Dr Mark Young of the US Army Research Institute. He was assisted by Maj Earl Nason of the Air Force and Dr Eric Heggstad of HumRRO. Dr Young introduced the Assessment of Individual Motivation (AIM) project the Army is conducting and discussed the background and some specifics of the AIM psychological screening instrument. He indicated that both Army and Air Force recruit data indicate that people who have low scores on scales derived from AIM are much more likely to attrit than others. AIM's design also reduces the likelihood of being faked, compared to many other personality instruments. Based upon these preliminary results, the Army is initiating a program to permit the enlistment of individuals who have no academic credentials, given they have acceptable ASVAB and AIM scores, along with other qualifications. Such individuals would have previously been ineligible to enlist, but under the Army's GED-Plus program are now eligible. Under this program, the Army would support these nongraduates in completing their GED while they are in the DEP. They would not be allowed to enter active duty until they earned their GED. Dr Young concluded his briefing with a discussion of the test implementation of this program to expand the potential recruit pool.

Screening, Selection, Attrition, Retention: Critical Issues

- Reasons for early attrition
- Management of personnel during time in DEP
- Understanding and tracking of attrition
- Smoking and attrition
- Use of personality screens for assessing personnel and reducing attrition
- Discussed retention programs successes and failures

In summary, let's look at the critical issues explored during our working group sessions. First, we explored reasons for early attrition, finding that medical reasons (including smoking) seemed to be the primary factors. Second, management of personnel in the DEP was a key issue, and we noted that active management of recruits is critical to reducing DEP attrition, which can be as high as 20%. Third, we looked at the need for automated systems to track and manage retention and attrition, especially at the occupational level. Fourth, we focused on the issue of smoking and early attrition and suggested that service non-smoking policies should be reviewed. Fifth, we examined the development and use of a personality screening instrument and how it could be used to enhance recruiting through enlarging the pool of potential recruits. Six, throughout the sessions, we looked at and discussed the strengths and weaknesses of various service retention programs.

Screening, Selection, Attrition, Retention: Potential Retention Program Initiatives

- Always more money for SRBs — but some concern that more does not always get higher retention
- Need retention management tools by occupation
- Determine how much attrition/turnover is “good”
- Better medical/psychological screening; validate and consider extension of use of psychological screens
- Develop and use a standardized exit survey or interview

Now, let's turn to exploring some specific new retention and attrition-reducing initiatives that were suggested during our working group sessions. Some of these initiatives are already in place in some of the services, but are listed here as reminders and to generate discussions about their potential. More money for retention programs, especially SRBs, was a common theme, but several people in our working group, and in the composite and plenary sessions, pointed out that more money does not always solve retention problems. Leadership and other intangibles (such as service to country) are also key to maintaining high force quality and force levels. Retention management models that predict and manage the force by occupation are critical because occupational-level retention must be better understood. Determining how much attrition is acceptable, especially during training is a key issue. Several speakers discussed the need for better medical and psychological screening and the use of psychological screening as predictors of early attrition. In addition, retention initiatives should include the validation and use of psychological screens for enlistment. Private industry continues to use such screens and their successes should be examined. Also, the working group strongly recommended that a standard exit survey or focused interview be used by all the services to facilitate understanding of the reasons for early attrition.

Screening, Selection, Attrition, Retention: Potential Retention Program Initiatives

(cont.)

- Make time in DEP count for pay
- Consider pay for personnel in DEP
- Assign DEP personnel to Selected Reserve
- Provide military facilities to DEP personnel
- Partner with community and industry for DEPers use of recreation and other facilities
- Use people in DEP as junior recruiters

Several recommendations involved the management and use of personnel in the DEP. These include paying people for their time in the DEP, which could be done by assigning them to the Selected Reserve. Also, allowing time in the DEP to count for pay once an individual is on active duty (a program that ended in the mid 1980's) could be considered. Providing DEP personnel access to military facilities (such as PX/BX, commissary, or recreation) and partnering with local communities and industry for use of facilities where military facilities are not available were also suggested. Using people in the DEP as junior recruiters would enable them to contribute to the military while they are in DEP status as well as offer opportunities for them to receive pay and service time credit. These types of initiatives would require further study to determine short and long-term effects.

Screening, Selection, Attrition, Retention: Potential Retention Program Initiatives

(cont.)

- Develop and use attrition/retention tracking system for all services
- Use common retention, reenlistment and continuation definitions
- Develop tracking system that follows service cohorts through terms of service
- Use of more targeted SRBs for hard-to-fill installations
- Allow sell back of leave during indefinite reenlistment period
- Use successful commanders and units as retention models and widely publicize reasons for success
- Redefine meaning of quality recruit

Each service would do well to have a retention/attrition tracking system similar to the Navy, especially augmented by common retention, reenlistment and personnel loss codes and definitions across the services as well as tracking enlistment cohorts across their military careers. Use of targeted SRBs by location, in use in the Army, was also suggested as a potential to help retention.

In addition, as the services are going toward an officer-like career reenlistment system, thought must be given to how leave sell-back will be handled at that career reenlistment point. With the key issue of leadership in mind, several speakers pointed out that successful commanders and units should be used as examples of what works in retention and publicize their successes. Finally, redefining the meaning of a quality recruit (e.g., placing GED graduates in the same category as high school graduates) could significantly expand the size of the recruit population market.

Screening, Selection, Attrition, Retention: High Priority Initiatives

- Make time in DEP count (\$\$\$)
- Assign DEP personnel to Selected Reserves awaiting Active Duty (\$\$\$\$)
- Better medical/psychological screening (\$\$\$\$)
- Publicize successful commanders and units (\$)
- Use of retention models (\$)
- Common retention tracking and definitions (\$\$)

Out of the many retention initiatives we discussed in our working group, we chose a set of initiatives which we thought would have either the biggest impact on retention or have a significant impact at a low cost. Various initiatives related to use and pay for time spent in the DEP were examined. Our group felt that two of these could have a large impact on reducing early attrition, especially attrition from the DEP. Although these would be costly and could require legislative action, either paying people for their time in the DEP, making time in DEP count for active duty pay purposes, or assigning personnel to the Selected Reserves while awaiting active duty would help make members feel much more a part of the military. The Selected Reserve initiative would also have the possibility of being more legally binding than the current reserve status of DEP personnel. Better medical and psychological screening would greatly aid in reduced early attrition. Better medical screening would be costly, requiring more medical resources and recruit processing time, but has a potential big payoff. Lower cost initiatives include publicizing good unit retention programs and common retention models and standardized retention/attrition terminology across the Department of Defense (DoD).

Screening, Selection, Attrition, Retention: Future Research and Analysis

- Year-group cohort retention/attrition studies by occupation
- Study effects of allowing smoking in basic training
- Track retention/attrition and performance behavior of Tier 2 and Tier 3 personnel

Finally, we looked at several specific needs for future research and development activities. Tracking and modeling retention by year-group cohort and by occupation would aid greatly in better understanding of the true nature of retention. In addition that the tracking should be by a thorough breakdown of demographic/psychographic data elements. A study of the effects of allowing smoking in basic training should be undertaken with the goal of reducing the high smoker attrition rate. And, finally, we recommended research to closely monitor the retention and attrition behavior of specially-screened Tier 2 and Tier 3 recruits to see how they differ (if they do) from Tier 1 recruits in both short-term and long-term performance and retention.

Military Recruiting and Retention for the 21st Century

Working Group 5 FORCE STRUCTURE/STRENGTH MANAGEMENT EFFECTS

**Chair: LtCol Scott Hagin
Co-Chair: Maj Jay Jacobson**

This working group focused on the relationship of force structure and force management to retention. Throughout its discussions, the working group sought to better understand:

- Analysis used in force management related to non-attrition retention (whereas working group 4 focused on attrition).
- Analysis considerations and issues other than direct retention causes (whereas working group 6 focused on direct retention causes).

Force Structure/Strength Management Effects: Working Group Issues

- **What are the effects of force structure and strength management on retention and the relationship to recruiting?**
 - Survey of force management modeling issues
 - Presentations across spectrum
 - Army retention status and initiatives
 - Expeditionary aerospace force
 - Air Force enlisted force management system
 - Determination of career field retention rate goals
 - Reenlistment rate prediction stability
 - Recruiting and retention/force management relationship

The working group focused on the question stated in this slide. While the title of working group was effects of “Force Structure,” the working group also looked at issues related to “Force Management” analysis. Force structure is usually thought of as the set of manpower requirements (quantity, skills and grades/experience) and force management includes the procedures (policies and programs), and basic tenets used to sustain our enlisted forces. Also, the working group constrained its definition of retention as that behavior between early attrition and retirement eligibility in a member’s service.

To address the topic question, the working group surveyed a number of analysis and modeling issues related to retention. The six formal presentations shaped discussion across the spectrum of force management analysis. To some extent, the time allowed did not permit the working group to provide comprehensive assessments of specific analysis issues.

Force Structure/Strength Management Effects: Critical Factors

- Link between attrition, retention and recruitment
- Multivariate approach to understanding significant interactions
 - Retention/compensation link
 - “Soft” retention factors
- Define productivity/effectiveness/workload relationship to objective force, retention goals, incentives
- Long-term effects of changes in existing programs
- Reliable data (operations tempo)
- Link between historical policies and behavioral data
- Stability of NMS-driven force structure requirements
- Impact of CS&P, technology decisions

Since retention creates a dynamic environment, it's important to understand and be mindful of the following critical factors or questions while predicting behavior to support force management decisions.

- Clearly, results of individual choices across the personnel life cycle shape the force and their link needs to be considered together when isolating impact of any single attrition, retention or recruiting decision.
- Because of this link, multivariate approaches to measure interactions are important. “Soft” factors such as Quality Of Life (QOL) need to be included in models.
- What is the productivity needed — and how is that productivity need met when varying retention goals and programs are decided?
- Long term effects of management decisions should be evaluated. For example, what is the impact on career retention of a first-term re-enlistment bonus (or an initial enlistment bonus)?
- Reliable data are critical — Operations tempo is a recent data requirement that appears to be difficult to capture.
- It's important to capture policy descriptions and history within personnel data systems so that the rationale for programs that influenced individual behavior can be reconstructed for analysis.
- Finally, force structure requirements are not static. It is important to look ahead at National Military Strategy (NMS), Competitive Sourcing and Privatization (CS&P), technology and other drivers that will change the basis for force management programs (especially at the career field level).

Force Structure/Strength Management Effects: Analytic Capabilities

- Services currently have varied ability focused on service-unique (mainly short term — FYDP) questions.
- Analysis primarily related to force management as opposed to objective force
 - Working to improve; Navy example
- Some knowledge of impacts of pay and tempo
- Limited ability to assess long term impact of force management decisions on retention

A complete characterization of the services' capabilities for force management and retention analysis was beyond the scope of this working group. Such a characterization would be difficult but useful. The working group discussed several key related points. First, the capabilities vary from service to service. The services (naturally) only consider service-specific questions. The services also appear to expend more effort in studying force management topics (service re-enlistment bonuses, enlistment bonuses, promotions, training, retraining) than in considering force structure issues (objective force, requirement definition). There are some exceptions, and the services are improving. For example, the Navy has contracted an effort to consider objective force questions.

The services also look more closely at near-term (within the Future Years Defense Program (FYDP)) impacts than at long-term impacts. We seldom consider longer-term problems that might be caused by today's management actions.

The services are beginning to look at the impacts of pay and tempo on retention. The Air Force is working with RAND to revive the Compensation, Accession and Personnel Management model (CAPM), make it Air Force Systems Command (AFSC)-based, and make it better able to directly consider certain kinds of trade-offs (incentives). But the services as a whole are not able to consider many AFSC/rate/MOS-level impacts.

Force Structure/Strength Management Effects: Promising Approaches

- Considerations in developing promising analytical approaches, tools, modeling, etc. to support program recruitment and retention related decisions:
 - Use computer technology (e.g. web) to allow data/analyses to be turned and shared more quickly, real time
 - Incorporate non-traditional approaches: data mining, neural net technology

The working group did not have the time or functional expertise representation to fully consider new analytical methods. However, some general comments surfaced. First, an attempt should be made to use internet technologies to smooth some data flow/model flow processes and to facilitate more real-time, quick-turn analyses.

Second, an attempt should be made to investigate using new technologies and approaches (such as data mining and neural nets) in our force modeling. Many of the services' models either were developed prior to the maturation of these methods or were developed at a time when computer processing technologies prevented their use.

Force Structure/Strength Management Effects: Actions Needed

- Use existing analysis and tools to allow endstrength management based on man-years rather than single endstrength target
 - Currently constrained by law
- Improve surveys — especially exit surveys — to link responses to historical demographics and behavior
- Improve quality and timeliness of data
- Develop work-around for Privacy Act problems with match/merging files by SSAN
- Establish retention goals at career field detail based on operational needs

The working group raised several opportunities for improvement. First, the services are required to fall within a narrow endstrength band on one specific day — 30 September — every year. This constraint causes the services to engage in force management activities in which they would not otherwise engage, and which may be counterproductive. These include shipping recruits originally scheduled for early October, in the last week of September. (This year, Army paid recruits \$6K each to do this.) Also, in order to meet an aggregate total, the services access people in the wrong skills (from a disaggregate perspective), eventually causing costly skill imbalances and impairing mission readiness in key skills. Further, knowing that endstrength must be met on 30 September and that late summer is the time for recruit surge, the services must force themselves to be well understrength in early summer. This causes the services' man years to be well below what is authorized, which means lost productivity and impaired readiness. It was suggested that this requirement to meet endstrength is archaic, an artifact from a day when it was extremely difficult to provide an accurate accounting of strength. Today we can provide near real-time strength figures at any time. It would be better to allow services to manage strength levels in some other way — like requiring each service to fall into a specified FY man year band. Because this endstrength requirement is in law, a legislative change would be required.

Second, surveys, especially exit surveys, should be improved to better capture the behavioral-demographic links that could improve our retention modeling. Similarly, every effort should be made to improve the timelines and quality of data. Many analyses require data from multiple sources to be merged via a Social Security Administration number (SSAN), which is difficult when outside agencies (e.g., contractors) are involved due to Privacy Act concerns. Possibly a DoD standard SSAN surrogate could be developed to get around this. This problem will become more important as more analysis projects are contracted out.

Finally, retention goals today exist only at the aggregate force level and do not reflect the individual AFSCs/MOSs/rates that clearly have different retention needs.

Force Structure/Strength Management Effects: Knowledge Sharing

- **Knowledge sharing can be enhanced by**
 - DoD retention cooperative for information exchange
 - Exchanges with other services (analysis and retention specific)
 - Use of private industry to help establish upper and lower bounds on certain key parameters

This and the next slide capture the working groups discussions about the knowledge, methods, or technology from the private sector or across services that can be transferred and used by others.

DoD retention cooperative for information exchange. We need a joint cooperative retention office -- not another DoD-level office that is separate from each of the distinct service's offices, but a "cooperative" office composed of each individual service's retention office that meets regularly (such as quarterly). This will provide a forum for information/policy exchange to ensure each service is aware of what the others are doing.

Exchanges with other services (analysis and retention specific) notes that the different services should compare what models each is individually using now to see how they can be applied DoD-wide rather than reinvent the wheel for each service (benchmarking). Specifically, the model that is being developed for the Navy (as briefed by Dr Paul Hogan) could be applied to Air Force and Army as well.

Use private industry to help establish upper and lower bounds on certain key parameters. As a military organization, we need to look at similarly structured private industries and their retention rates for similar jobs (e.g., aircraft mechanic for Delta Airlines). For military specific jobs such as infantry where there is no private sector correlation, we can still compare compensation for similar demographics-age, workload, time away from home, etc. We can study what the private industries do that are successful (or not successful) for retention (e.g., United Parcel Service (UPS) providing 100% college tuition for their part time employees doing the "grunt" work of moving boxes).

Force Structure/Strength Management Effects: Knowledge Sharing (continued)

- **Knowledge sharing can be enhanced by**
 - Standardize use of terms like retention, reenlistment rates, etc.
 - Compensation behavior models (RAND CAPM model — being updated with new economic data, includes all services)
 - Blue/Gold rotation model of Navy taking care of its own

Standardize use of terms like retention, reenlistment rates, etc. The Army and Navy use the term reenlistment rate as equivalent to the Air Force's keep rate, which includes those not eligible to reenlist. The Air Force and Coast Guard, however, determine reenlistment rates using only those eligible to reenlist. If we standardize terms, it will help in using similar retention models across the services and recommendations will affect or be based on similar populations of force personnel. This will especially be helpful when briefing the Joint Chiefs of Staff (JCS) so we are all "singing from the same sheet of music."

Compensation behavior models. RAND's Compensation, Accessions, and Personnel Management (CAPM) model is being updated to reflect today's economy. It will be used to determine the cost to service (USAF) to train/grow a new accession to replace an experienced service member who leaves. This could help to determine the cost of having the experienced member stay, with or without a bonus, or letting the member leave. This model could be shared across all services to aid in determining their cost of a soldier/sailor, etc.

Blue/Gold rotation model of Navy taking care of its own. Navy briefed that it has a program where a unit that stays at homestation is assigned to assist family members of other units that are deployed. This ensures piece of mind for the deployed member that his/her family will be taken care of.

Force Structure/Strength Management Effects: Needed Research

- Objective force determination
 - Get high-level agreement, unified opinion and legislative change to manage to objective force, rather than to endstrength
- Societal and cultural influences — better understanding of different behaviors of different groups
- Impact of technology on force structure (Navy manning the ships smarter)
- Validity of current forecasting approaches
 - Retention model parameters (linear regression coefficient stability)

The first recommendation on the slide is the key recommendation to come out of our working group. The recruiting and retention problems are stymied by the fact that we are congressionally mandated to manage to meet a narrow one-time per year strength number rather than a wider, more flexible band. Having a band would allow the services to manage toward an objective force and be able to manage accessions, training (filling school houses), and manning the units with mission ready people. Also, we need to be able to manage the force based on man-years vs endstrength at a point in time to ensure we have the right experience to meet mission demands. Currently the endstrength requirement is set in law, but we need to break the paradigm.

Second, we have not (as a whole) applied social science methods extensively to gain understanding on the differences in retention involving demographic groups.

Third, we need to better determine the impact of technology on force structure, such as the Navy manning ships smarter. We need to look at research on how technology might reduce manpower, i.e. having computers reduced the need for some administrative troops in Air Force but at the same time increased need for LAN administrators and computer maintenance personnel. Where can technology *truly* aid the force structure?

Finally, additional research in testing the validity of current approach would help maintain confidence in retention predictions — particularly in the volatile retention environment as described by Dr Wilcox in his presentation on coefficient stability.

**Force Structure/Strength Management
Effects: Memorable Thought**

“The general is well aware that the forecasts are no good. However, he needs them for planning purposes.”

From an Army Air Corps staff package during WW2 recommending that we stop trying to forecast the weather one month ahead, since the results were no better than random (Kenneth Arrow, “I know a Hawk from a Handsaw,” 1992 essay).

In closing, the working group considered this memorable quote.

Military Recruiting and Retention for the 21st Century

Working Group 6 INFLUENCES/CAUSES OF RETENTION

Chair: LTC Eli Alford

Co-Chair: Dennis Baer

This working group of 30 to 40 professionals was composed of a mix of 85% from within DoD and other federal government agencies (General Accounting Office (GAO) and Congressional Budget Office (CBO)), and the remaining 15% from corporate analytical agencies and Federally Funded Research and Development Centers (FFRDCs). There was a similar mix in the familiarity with recruiting and retention issues — 85% professed some background; the rest did not. This mix of analytical, functional and budget experience led to discussions that, in general, focused more on problem definition and analytical results rather than specific analytical methodologies and models.

Influences/Causes of Retention: Working Group Issues

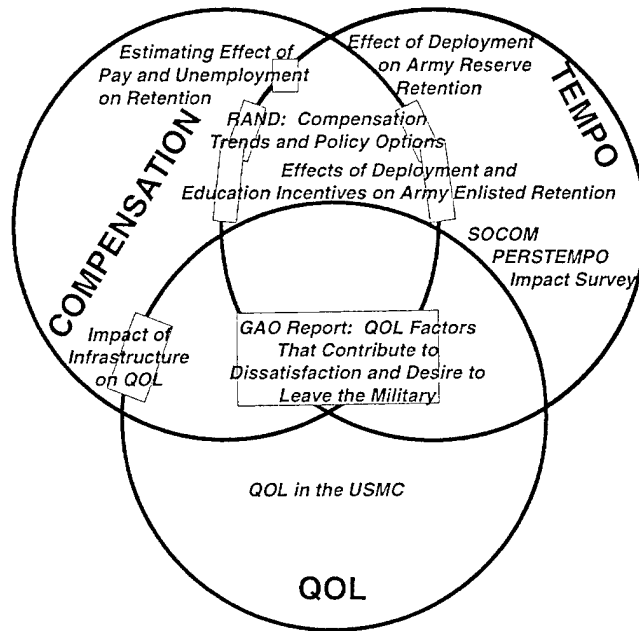
- USAF compensation strategy and trends and policy options in military compensation
- Estimating effects on retention:
 - Pay and unemployment
 - Personnel tempo
 - Deployments
 - Education incentives
- Quality of life issues

The working group used a series of presentations (topic listed above) on various aspects of retention influences (compensation, tempo and Quality Of Life (QOL)) to generate discussion on how we determine the relative importance or contribution of each of them to individual retention decisions. These presentations included:

- USAF Compensation Strategy; Brig Gen Regni, USAF
- Estimating the Effect of Pay and Unemployment on Retention: A Case Study; Dr Steven Wilcox, GRCI
- Military Compensation: Trends and Policy Options; Dr James Hosek, RAND
- Personnel Tempo: Definition, Measurement, and Effects on Retention, Readiness, and Quality of Life; Dr Paul Sticha
- Effects of Deployment on Army Reserve Retention; Dr Bob Barrios-Choplin, NPS, and LT Michele McCloskey, USN
- USMC Quality of Life Studies; Maj Doug Marr, HQ, USMC
- Effects of Deployment and Education Incentives on Army Initial Term Retention; Maj Gene Piskator, Army PERSCOM
- Quality of Life Factors That Contribute to Military Personnel Dissatisfaction and Desire to Leave the Military; Dr Carolyn Copper, GAO
- The Impact of Infrastructure on Quality of Life; Stan Horowitz, IDA

Influences/Causes of Retention: Initial Model

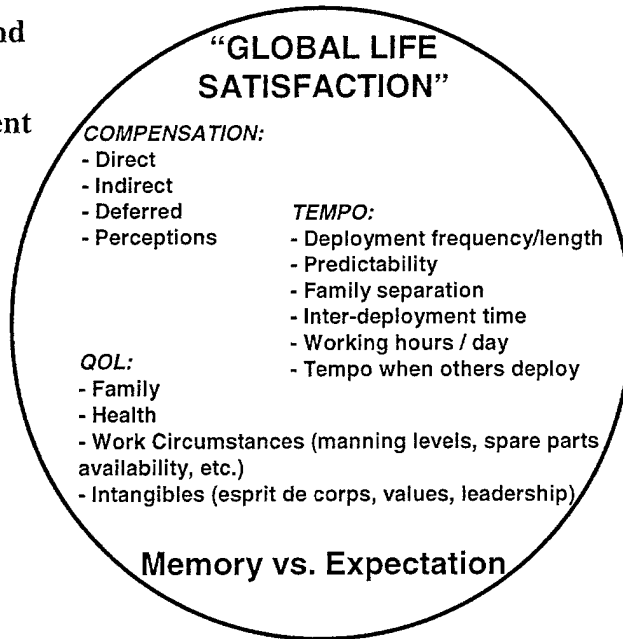
- What are direct influences and causes of retention?
- Initial approach assumed three related areas:
 - Compensation
 - TEMPO
 - QOL



Initially, the chair established a conceptual model of how the presentations fit the overall structure of the problem. The Venn diagram above illustrates the initial idea that all three subject areas were essentially different, but in some respects related and overlapping. Most of the presentations focused more on compensation and tempo areas; less so on QOL issues.

Influences/Causes of Retention: Emerging Model

- Direct influences and causes retention?
- Evolved to a different conceptual model



As the meeting progressed, a different conceptual model emerged. All three influences may be considered contributors to a measure of "global life satisfaction." We discussed several issues. First, there are various aspects of compensation, which include the key element of servicemember perceptions of compensation adequacy. Also, there are standard frequently measured aspects of tempo such as deployment length and frequency, but concluded that current measures are inadequate to fully portray today's pace. For instance, no one captures the additional work burdens suffered by servicemembers left behind at CONUS locations when others on their installation deploy OCONUS. In addition, they are aspects of QOL. Significantly, a recent GAO study (September 99) concluded that "work circumstances," which include adequate manning and other measures of one's wherewithal to get the job done, are important. The GAO survey concluded that the majority (62%) of the QOL factors with which retention-critical specialty servicemembers are dissatisfied are *work related*. Also, 80% of the factors officers identified as reasons to STAY in the military were also related to work circumstances and the top 2 were the "intangibles" of military service: military values and lifestyle and esprit de corps.

Finally, there may be a gap in our knowledge of retention influences in the form of memory versus expectation. Our data captures past events (what soldiers remember), but retention decisions may be based more on anticipation of future circumstances. For instance, if a servicemember anticipates an unacceptable level of future PERSTEMPO and decides to depart the service, this decision may not be adequately modeled by deployment indicators in the servicemember's personal history.

Influences/Causes of Retention: Critical Factors

- Clean data, clear definitions, common metrics
- Common processes and framework...but recognize service differences
- Improve data gathering and customize it between services
- Issues are time sensitive and dynamic...longitudinal data required
- Individual quality measures...for retention
- An objective force...what are the services' longevity targets?
- Causal relationships

“Bumper Sticker” Logic Does Not Compete Well for Resources

The bottom line is that we must find ways beyond vignettes and anecdotal evidence to justify our investment in improved retention programs. It is not enough to say, “*We must retain a quality force.*” QOL and retention solutions are complex, and oversimplification of the problem is a failed strategy. We need empirical evidence and must establish causal relationships between aspects of “life satisfaction” and unit/system readiness to make our case for resources.

Research in this areas suffers from a lack of consistency in data, definitions, metrics and analytical frameworks between the services. Most in the working group agreed that a common framework for analysis was a good thing, but that we needed to be careful not to suggest a “one size fits all” solution for all the services. We also need to improve our data gathering efforts including recognition of a requirement for a long-term view.

We discussed the possible requirement for a quality measure for retention much as we have for recruiting. The Armed Forces Qualification Test (AFQT) is a universal measure for all service recruits. However, the AFQT is not a sufficient measure of retention quality since it does not include the investment in training and development while in the service. We know we are keeping those who are meeting the minimum standards, but how can we know if we are keeping the best of those who exceed those minimums? How many high quality service members are separating from the services? Without a quality measure, we can only guess.

Finally, as brought up in the other two retention working groups, we don't have a good understanding of what our objective force looks like in terms of longevity. Each service establishes a structure to which we fit personnel inventory. We balance that inventory in terms of grade mixes. But we are limited in our ability to shape retention until we have defined success in terms of a mix of young and strong, and older more experienced servicemembers. Without that definition, retention analyses are less relevant and useful.

Influences/Causes of Retention: Analytic Capability

- Currently fragmented analysis efforts...no focal point
- Some ability to analyze compensation and tempo issues
- Less capable addressing “life satisfaction” issues (especially the intangibles)...USMC may be the exception
- Particularly difficult to measure intangibles as predictor of retention behavior
- Complete inventory of services’ analysis capability would be helpful
- Lack of analytical resources: manpower and funding...or priority
- Analysis results are perishable
- “Over-surveying” is an issue

Our current efforts across the services appear to be disjointed. Unlike recruiting, which has a focal point command in each service, retention has many players interested in different aspects.

We recognized that our ability to assess compensation pay effects is theoretically rich with a long history of improvements in measurement techniques, but is comparatively weak in statistical assumption checking and models to confront assumption violations.

We also have some capability to assess tempo, but it is bound by the current limits of tempo measures and definitions. It is difficult to draw out relationships between tempo and retention. However, we have a less rigorous analytical capability for QOL issues. USMC has the best capability we saw at the mini-symposium, but we can’t make a true assessment of our capability until we have done a complete inventory of each service’s analytical capabilities. Nor does it appear that anyone has taken the lead on assessing the role of intangibles in QOL and retention.

The services downsized analytical capabilities make tackling these issues problematic. Analytical resources are currently stretched. If these issues are important, then some re-prioritization of effort may be required.

We can’t make decisions on old analysis results either. Changes in policies and programs (such as the FY00 changes to pay tables) may change retention behavior, but we cannot link cause and effect without studying it with more recent data.

Finally, we may have duplicative survey efforts without any integration of results. Over-surveying includes too much surveying and “everything but the kitchen sink” approach. This stems from the problems and lack of consensus with defining and measuring QOL. Long, drawn-out surveys can become a legitimate response-rate obstacle.

Influences/Causes of Retention: Promising Analytical Approaches

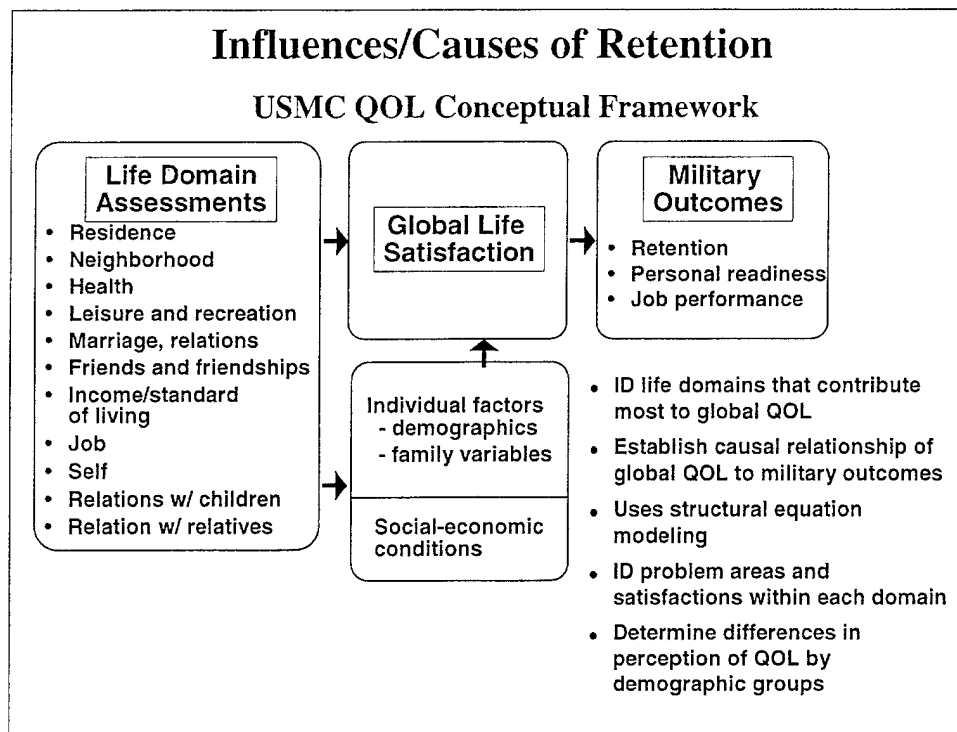
- USMC QOL model (structural equation modeling)
- Installation status report and service base costing database
- Simulations
- Multi-level regression
- Logistic regression
- Residual analysis of all regression models is necessary for validation
- Benchmarking with private industry and surveys
- Survey and analysis feedback loop
- Information and analysis for priority setting

This slide lists promising approaches that could better support retention-related decisions. First, the USMC QOL model, described in further detail in the next slide, provides promise. As described by an IDA presentation, an installation status report of the Army gave the effects of infrastructure on QOL, indicating that databases containing costs by each service for installations could help provide the necessary data for possible effects on QOL.

Other tools like simulation and regression (both logistics and multi-level) provide approaches for comparison, interaction and forecasting of results. Analysis of the residuals from regression models will help validate the individual model's applicability to the problem to ensure that the analyst is not exceeding valid bounds or breaking model assumptions.

Private industry's recruiting and retention efforts and surveys are a good benchmark for military efforts. Results of surveys and analysis need to be fed back through decision makers and key leadership positions.

Finally, policy makers need information and analyses to set priorities. The services cannot buy everything, so when many potential QOL options are available, decision makers need information that lets them figure out what's most important, and the decisional costs and benefits.



Research has generally shown that a combination of subjective and objective measures provide the most comprehensive picture of QOL. Researchers also generally agree on the life domains included in perceptions of Global QOL, although labels may vary. A RAND report (Buddin 1998) discusses and recommends DoD develop specific criteria for assessing well-being and endorses well-being studies for offering valuable insights into the relationships between support program use, member/family well-being and readiness outcomes. The report addresses issues of objective and subjective well-being data intertwining with the issues of goals and how QOL programs should attempt to enhance both.

QOL is measured through an assessment of various life areas, or “domains.” Marines’ self-report about how they feel in 11 various life areas listed on the chart to the basic question “How are you doing?” Six items also address overall QOL and are compiled into a composite score called “global QOL.”

But the Corps wants to ensure not only that their Marines are satisfied with their QOL condition, but also that the resources expended on delivering that QOL contribute the most to mission outcomes — readiness, retention and performance. For this the Corps uses Structural Equation Modeling (SEM) as a statistical technique for making sense of the complex set of factors that affect QOL — relationships among the various life domains, ancillary life factors, global QOL and military outcomes. This allowed the Corps to begin to make programmatic and resource decisions — and tradeoffs — which can best improve QOL *and* mission performance. An additional product of the 1993 and 1998 QOL survey was a SEM depicting the relationships among domain-specific QOL, global QOL, organizational outcomes and ancillary life factors. The slide depicts an example of such a model, without the numbers indicating results.

SEM involves the measuring of both independent and dependent observed variables. However, SEM allows us to look at not only a single relationship between the independent and dependent variables, but allows us to examine a series of relationships simultaneously. For example, what life domains determine global QOL? How does global QOL combine with these life domains to affect career intentions and personal readiness? SEM allows us to analyze the cause-and-effect relationships between these variables. In addition, it allows us to assess how much error is inherent in our measurements thus telling us how well we are measuring the phenomena of interest.

Influences/Causes of Retention: Actions Needed To Increase Retention Effectiveness

- Deployment management
- Appreciation of TEMPO — hrs/day, turbulence, family separation
- Estimate returns on investment (Activity Based Costing, Feb 99)
- Establish and market true expectations of military life
- Measure intangibles (using indicator variables)
- Better linkage of recruiting-attribution-retention initiatives
- Validate manpower/structure requirements
- Proper articulation for various audiences

The actions listed in this slide should increase the effectiveness of retention efforts. Although the number and length of deployments are generally subject to operational and strategic requirements and are out of the service's direct control, efforts to better manage service member's time between deployments and to provide equity in deployment burden-sharing may provide some relief.

The use of Activity Based Costing (ABC) on investments for QOL, such as housing and maintenance, can provide feedback on whether the services are receiving a positive return on their investment. True expectations of military life should be established and marketed to young recruits, so they are not "disappointed" with their actual experience — which will be manifested in retention behavior.

Often items that may increase recruiting (such as education benefits) may decrease retention, as men and women depart the service to use their benefits. Services should determine what their end goal should be. Overall manpower structure requirements should be reviewed and coordinated with recruiting and retention efforts. The results of these analysis can be articulated in various ways to fit the needs, education, experience or management levels of the audience.

Influences/Causes of Retention: Knowledge Sharing

- Real-time on-line surveys (CNN)
- Fixed email addresses (Army Knowledge Online)
- Maximize information sharing (counter stovepiping)
- Capitalize on private sector forum
- Standardized costing
- Assumption-based planning (RAND methodology)
- Measure outputs as well as inputs
- Define core attributes, but expect different weighting between services

Certain methods or technology from the private sectors or across services may be transferred to the other services. Several are listed on this slide. Near real-time on-line surveys like Cable News Network (CNN) uses could provide paperless surveys for rapid feedback on the pulse of the force on a given issue. Fixed email addresses that stay with the uniformed individual regardless of where they are assigned could facilitate follow-on surveys. The Army Knowledge Online effort is one such system.

Currently, most service retention analyses are stovepiped. Better efforts to share information within/between services can minimize duplication and maximize use of scarce analytical resources within DoD. Also, corporate views of retention were insightful and future military retention studies should seek to incorporate applicable corporate best practices.

Standardized costing of retention-related measures would facilitate assessment of similarities and differences among services. It is difficult to compare service efforts without a common understanding of costs and benefits. Also, using assumption based planning may help strategic retention planning. RAND uses this tool to predict possible long term futures. We also could measure analysis outputs in terms of what we invested using a linear or exponential relationship — such as X dollars in housing maintenance results in retention increase by Y%, or average years of retention = dollars invested ^{.0789}. Finally, the core attributes (what make people retain or depart) can be defined across our military system, but the weighting of these attributes may differ between services.

Influences/Causes of Retention: Promising Actions Needed to Improve Analyses

- Individual deployment tracking procedures required by June 2000 in order to meet FY00 NDAA PERSTEMPO pay requirement
- Feedback to sponsors and senior leaders
- 68th MORS Symposium Working Group 20 follow-up
- Central data repository or hot links site (DMSO-web?)
- OSD Retention Working Group

This slide lists promising actions that are needed to improve our ability to undertake needed analyses. The FY00 National Defense Authorization Act (NDAA) requires much better measurement and management of high deployment tempo service members. This requires PERSTEMPO measurement and a process to track deployments amongst individuals.

Communicating the many ideas that surfaced in this meeting and feedback to the MORS Sponsors and service leadership is a key step to ensure these initiatives can become reality or enter the mainstream of service thinking. Also, Working Group 20 (Manpower), which will be convened at the 68th MORS Symposium at the United States Air Force Academy in June, 2000, would be an excellent forum to continue discussion of this mini-symposium and information sharing between the services. Also a central repository for retention-related information, such as a website with specific information for literature searches and hotlinks to other websites would be a "one time shopping" source for all members. Finally, there is a DoD retention working group run by OSD(P&R) that could be used to vet analyses or become the basis for a joint working group on retention.

Influences/Causes of Retention: Research Needed

- Expand GAO study (focused on more than “retention-critical”)
- Follow up on “stay/leave” intentions
- Long term measurements
- Satisfaction metric definition
- Insight into deployment and retention relationships
- Family member research
- Cost-benefit comparisons
- USMC QOL next step... which of 11 domains have most impact?
- Linkage of retention and recruiting
- What are future retention requirements?

This slide lists recommendations for further research. These items are not ranked in order of importance or resource requirements.

A GAO study focused on “retention-critical” specialties, therefore the service members questioned were already identified as having lower satisfaction. We should follow up with a more broad-based assessment.

Do people who say they plan to leave really leave? An Army Research Institute study* indicates that people do follow through, but this merits further study and needs to be measured over time, not just a point estimate.

How do we define satisfaction? What are acceptable levels or benchmarks of dissatisfaction?

We need to continue special research subjects, going beyond what’s already been done in such areas as family member research and the relationship of deployments to retention.

We need to be able to assess the costs and benefits of alternative policies and resource decisions to support retention. For instance, investment in improving which one of the 11 QOL domains in the USMC model would provide the best payoff?

We need to drive home the linkage between retention and recruiting. Policies for one affect the other and need to be synchronized.

We need to look beyond the current fiscal year to determine what our long term retention requirements will be as service members age through the force.

* Guthrie, T. J., (1992) Career Intentions and Behavior of Army Officers: A model Testing Approach (Technical Report 946). Alexandria, VA: U.S. Army Research Institute.

Appendix A. Acronyms

ABC	Activity Based Costing
AFQT	Armed Forces Qualification Test
AFSC	Air Force Systems Command
AIM	Assessment of Individual Motivation
AOL	America On Line
ARISS	Army Recruiter Information Support System
ASVAB	Armed Services Vocational Aptitude Battery
Brig Gen	Air Force Brigadier General
CAPM	Compensation, Accession and Personnel Management Model
CBO	Congressional Budget Office
CDR	Navy Commander
CMS	Call Management System/ Central Monitoring Service
CMSgt	Air Force Chief Master Sergeant
CNA	Center for Naval Analyses
CNN	Cable News Network
COL	Career Opportunities List
CONUS	Continental United States
COTS	Commercial Off-The-Shelf
CPF/CLF	CINCPACFLT/CINCLANTFLT
CS&P	Competitive Sourcing and Privatization
DEP	Delayed Enlistment Program
DMSO	Defense Modeling and Simulation Office
DoD	Department of Defense
FFRDC	Federally Funded Research and Development Center
FY	Fiscal Year
FYDP	Future Years Defense Program
GAO	General Accounting Office
GED	General Education Diploma
Gen	Air Force/ Marine Corps General
GRCI	General Research Corporation, Inc.
IDA	Institute for Defense Analyses
J1	Joint Staff-Director of Manpower and Personnel
JCS	Joint Chiefs of Staff
LAN	Local Area Network
LTC	Army Lieutenant Colonel
Lt Col	Air Force/ Marine Corps Lieutenant Colonel
LTG	Army Lieutenant General
Maj	Air Force/ Marine Corps Major
MCPO	Master Chief Petty Officer
MEPS	Military Entrance Processing Station
MOS	Military Occupational Specialty
NCCM(SW)	Navy Career Counselor Master Chief (Surface Warfare)
NCO	Non-Commissioned Officer
NDAA	National Defense Authorization Act

NEC	Navy Enlisted Classification
NMS	National Military Strategy
NPRDC	Navy Personnel Research and Development Center
NPS	Naval Postgraduate School
NRC	Navy Recruiting Command
OCONUS	Outside the Continental United States
ONDCP	Office of National Drug Control Policy
OPR	Office of Primary Responsibility
OPSTEMPO	Operations Tempo
OR	Operations Research
ORS	On-Line Recruiting Station
OSD	Office of the Secretary of Defense
PA&E	Program Analysis and Evaluation
PERSCOM	Personnel Command
PX/BX	Post Exchange/Base Exchange
QOL	Quality of Life
RADM	Rear Admiral
RSL	Recruiter Station Location
SEM	Structural Equation Modeling
SGM	Sergeant Major (Army)
SgtMaj	Sergeant Major (Marine Corps)
SRB	Selective Reenlistment Bonus
SSAN	Social Security Administration Number
TRADOC	Training and Doctrine Command
UPS	United Parcel Service
USAF	US Air Force
USAREC	US Army Recruiting Command
USMC	US Marine Corps
USN	US Navy
VADM	Vice Admiral
WW2	World War II
YATS	Youth Attitude Tracking Study

Appendix B. Terms of Reference (TOR)

MILITARY OPERATIONS RESEARCH SOCIETY (MORS) MINI-SYMPOSIUM MILITARY RECRUITING AND RETENTION FOR THE 21ST CENTURY 27 - 30 SEPTEMBER 1999

1. Background

The military services are currently experiencing difficulty recruiting and retaining adequate numbers of quality enlisted people necessary to meet operational requirements. Recent recruiting efforts have not met goals and military personnel are opting to leave the military at rates higher than is required to maintain adequate end strength.

This is not a simple numerical shortfall. Potential recruits must meet specific educational, moral, and test score requirements. Increasingly, potential recruits who meet these requirements are opting for college or are being actively sought out by the private sector for the same reasons that make them attractive to the military services. The DoD is devoting more people to the recruiting effort and spending more money each year to attract these youth. Then DoD is investing significant resources (including time, skilled instructors, and classroom facilities) to train and develop these new personnel. Far too frequently, after these people are located, recruited, and trained they opt to leave the service for civilian employment. To the extent that retention goals are not met, this drain of human capital from the military diminishes personnel and overall military readiness. With this in mind, the Military Operations Research Society (MORS) has organized a mini-symposium, devoted to a series of speakers, panels, and working groups who will address enlisted recruiting and retention issues at plenary sessions and at focused work group sessions.

The issues and problems are compounded for the 21st Century because of the transformation the services are making in their force structure; i.e., Army After Next (AAN), the Expeditionary Aerospace Force (EAF), and the Navy's "From the Sea." With new organizations and the requisite changes in deployment policies, personnel recruiting and retention will not be made easier. The effects of these new services' initiative must be well understood.

2. Goals and Objectives

The goal of this mini-symposium is to contribute to the deliberate planning of military personnel management efforts by developing a clear understanding of the factors which shape the recruitable population pool and the retention of those already in the service. The mini-symposium will afford the analytic community and subject matter experts the opportunity to exchange state of the art information; raise awareness of issues and direction; understand analytical results; and gain appreciation of methodology and tools. In particular, discussion of new or different policies and analytical approaches to these issues will be of interest.

The objectives of the mini-symposium are to:

- (1) recognize the factors which have the greatest impact on recruiting and retention and the gaps in our knowledge about incorporating these factors in analyses;
- (2) identify the strengths and limitations of available data sources, measures, tools and methodologies applicable for conducting analyses of these issues;
- (3) evaluate methods for analyzing policy alternatives, including predicting recruiting resource requirements and retention incentives; and
- (4) determine the need for and use of new or advanced tools, methods and research to remedy current shortfalls in analyses and gaps in our knowledge.

3. Issues

Within the context of these goals and objectives, the mini-symposium will address the following issues regarding recruiting and retaining the force.

3.1 Issues: Recruiting the force

- **What are the differences and similarities among Services and how do they contrast with industry? This includes:**
 - Evaluating methods for establishing recruiting goals and measuring shortfalls
 - Evaluating measures of effectiveness for recruiting methods and programs
 - Identifying data and tools for determining resources for recruiting efforts – people, locations and budgets
 - Evaluating the management of recruiting staff and incentives for recruiters
 - Evaluating the effects of voluntary manning of recruiter billets
 - Evaluating the effectiveness of the Delayed Entry Program
 - Estimating the impact of the economy and other factors
 - Understanding active vs. reserve recruiting
 - Assessing recruit interests and incentives
 - Evaluating re-engineering options, such as potential for use of external agencies or outsourcing the recruiting effort
 - Technological opportunities
 - Use of non-cognitive assessment (personality assessment and/or life event assessment) as a predictor of attrition (both early in basic training and on the job in the first term) and other measures of job performance
- **How effective are enlistment incentives? This includes:**
 - Assessing the utilization and impact of current and potential enlistment incentives to generate additional recruits
 - Assessing the utilization and impact of current and potential enlistment incentives to channel recruits into specific skills and shipping months
 - Assessing effectiveness of increasing enlistment incentive levels to counter declining unemployment and increasing college opportunity
- **How effective is advertising in reaching the target market? This includes:**
 - Assessing the use of various media and their relative effectiveness
 - Determining the cost effectiveness of advertising campaigns

- Determining the need for and assessing the effectiveness of special targeting, such as foreign language advertising
- **How effective are the quality standards (High School Degree Graduate (HSDG) vs non-HSDG; Armed Services Vocational Aptitude Battery (ASVAB) score requirements)? This includes:**
 - Determining the reasons for attrition and its impact during various career phases
 - Delayed Entry Program
 - Recruit Training
 - Advanced schools
 - Initial duty assignment
 - End of first enlistment
 - Understanding links to job standards and training
 - Understanding links to operational requirements
 - Evaluating different standards

3.2 Issues: Retaining the Force

- **What are the differences and similarities among Services, and how do they contrast with industry? This includes:**
 - Evaluating definitions and methods for establishing and measuring retention goals
 - Evaluating the use and impact of bonuses
 - Evaluating the effectiveness of the Army location targeted SRB program
 - Understanding attrition and retention (year point of departure)
 - Evaluating the loss to the military services of certain in-civilian-demand skills
 - Understanding gender/racial/ethnic issues
 - Understanding the perceived effects of OPTEMPO/PERSTEMPO
 - Understanding the perceived value of military compensation, training received, housing and health care, and educational benefits
 - Evaluating the optimal force mix by grade and length of service as a starting point to establishing recruiting and retention goals
- **What are the reasons for leaving? This includes:**
 - Identifying data, tools, and methods for assessing impact of:
 - OPTEMPO/PERSTEMPO
 - Financial / benefits package
 - Quality of life factors
 - Lack of promotion opportunity
 - High year tenure policies
 - Exit survey results analysis
 - Intangibles
 - Leadership quality
 - Co-workers
 - Family desires etc.

4. Approach

A three day program is planned to start Monday about noon and end Thursday at noon. It will include information exchange at three levels: plenary sessions, composite sessions and working group sessions.

4.1 Plenary Sessions: Approximately one-third of the time will be devoted to a series of speakers and panels, who will address plenary sessions. The first session will include welcoming remarks and a keynote speaker who will address the broad issues of recruiting and retention and the impact on force structure. Other plenary sessions will also address systemic issues affecting both recruiting and retention and the interaction of the two. Consideration is being given to inviting speakers from various industries, the Congress or congressional agencies, academic institutions, FFRDCs and other think tanks, and from the military services and OSD. These plenary sessions will be interspersed with composite and working group sessions that will permit the participants to discuss possible applications of plenary session information to their current and future work.

4.2 Composite Sessions: Mini-symposium participants, at several points in the meeting, will be organized into two composite groups—one on recruiting and the other on retention. Speakers and panels will be invited to discuss issues specific to these areas (see above).

4.3 Working Group Sessions: Mini-symposium participants, at several points in the meeting, will be organized into multiple (up to six) working groups, that will consider more specific recruiting and retention issues such as those listed above. At least one working group will focus on cross cutting issues and the integration of recruiting and retention analyses. To foster the maximum exchange of information about specific approaches and analyses, the working groups will be structured to include participants from each Service, OSD, JCS, other government agencies, and non-government groups. Working group sessions may use internal discussion or have formal presentations by individuals or panels.

5. Products

Composite and working groups will draft a summary and an integrated list of issues, concerns, and recommendations, which will be presented in the final session on Thursday morning. More specifically, the composite and working groups will be tasked to:

- identify factors which must be considered to ensure that analyses of recruiting and retention issues are relevant and useful;
- assess ability to plan, conduct, and analyze the specific issues addressed by the group;
- identify promising analytical approaches, tools, modeling, etc. to support program decisions;
- determine actions for increasing the effectiveness of the recruitment and retention effort through better data, measures, tools, and analyses;
- assess transferability of knowledge, methods, technology from the private sector and across service to include joint efforts;
- recommend most promising actions needed to improve our ability to undertake needed analyses and estimate the time required for implementation; and

- recommend areas for further research.

Prior to departure, the composite and working group chairs will draft a summary of their out-briefs and recommend topics or reports to be included in the final report. After the mini-symposium, the chairs will submit a summary report to the MORS office within 30 days and a full report within 90 days. The reports, submitted in written and electronic form, will draw on the information above and include an Executive Summary, articles about the workshop suitable for publication in *PHALANX* and elsewhere, and reports and briefs from composite and working groups.

6. Administrative

Title: Military Recruiting and Retention for the 21st Century
 Dates: 27– 30 September 1999
 Location: Institute for Defense Analyses, Alexandria, VA
 Fees: \$180 federal government employees; \$360 all others.
 Attendance: 125 participants interested in recruiting and retention issues and analyses to include, but not limited to, functional experts, resource analysts, and manpower and personnel analysts.
 Classification: Unclassified
 Chair: Dr. Harry Thie
 Co-chair: Chris Fossett

7 July 1999

Appendix C. List of Participants



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MajGen Garry Parks
United States
Marine Corps



*Building the Corps of
the 21st Century*



THE MARINE CORPS RECRUITING COMMAND

"BUILDING THE CORPS OF THE 21ST CENTURY"

THE MILITARY OPERATIONS RESEARCH SOCIETY



27 September 1999



ALL VOLUNTEER FORCE

"We were simply unprepared. There were two fundamental errors in our thinking. First of all, we thought everybody wanted to be a Marine. Second, we thought we could make a Marine out of anybody."

**General Sam Jaskilka
Assistant Commandant of the
Marine Corps**



"NEVER AGAIN!"



1975

< 50% High School Grads

25% Upper Half of Mental Groups

40% Used Drugs in Previous 30 Days

48% Used Drugs in Previous Year

18,369 Deserters

McClure Incident at MCRD San Diego

Recruiting Improprieties



ALL RECRUITED FORCE

- Commitment to Quality:

"I don't care if there are only two Marines in the Corps, me and my driver. It will be a *quality* Corps."

General Louis H. Wilson, CMC

- Consolidation of recruiting and recruit training responsibilities
- Systematic recruiting--standardized, measurable, and synergistic

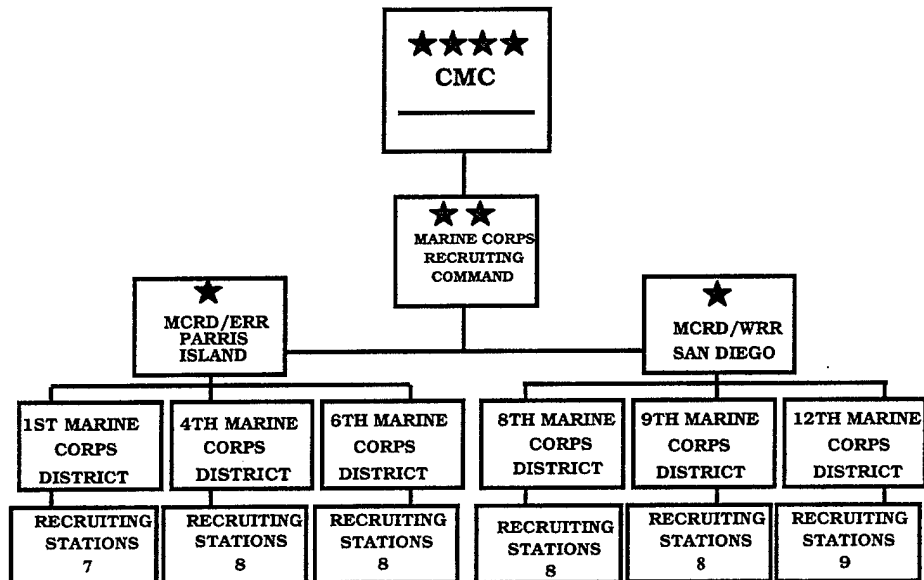


1994

Recruiting Command established

- Commanding General, vice staff officer at HQMC M&RA
- Direct Access to the Commandant
- Achieve Unity of Command/Unity Of Effort

MARINE CORPS RECRUITING COMMAND



THE FUTURE

Chaos on the Littorals

The "Three-Block War"

Operational Maneuver from the Sea

"Sea Dragon"

Warrior Experiments

Marine Corps Amphibious Triad

AAAV, MV-22, LCAC



MARINES IN THE 21ST CENTURY

The Strategic Corporal

- Character, strength, intellect
- Imbued with our core values
- Independent operators
- Trained to seek responsibility
- Smaller units, higher impact missions

*These Marines must be able to fight
the Three Block War!*



THE REALITY OF MARINE RECRUITING

- CHALLENGES
 - HIGHER INDIVIDUAL APTITUDE REQUIRED
 - SLOW YOUTH POPULATION GROWTH
 - LOW PROPENSITY TO ENLIST
 - COMPETITION FOR QUALITY
 - STRONG ECONOMY, JOB MARKET
 - RECORD LOW UNEMPLOYMENT

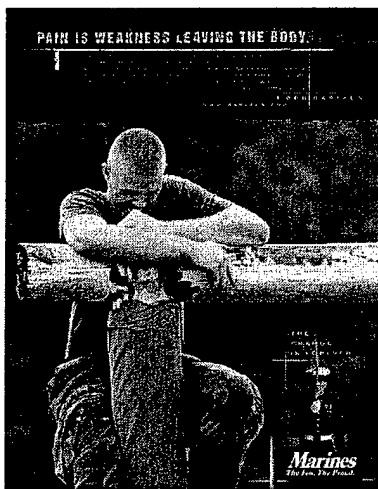


“AMERICAN YOUTH”

- Want to be challenged
- Want to be measured against a standard
- Want to be held accountable
- Want to belong to something bigger than themselves...but that they can be proud of
- Don't mind being lead, but want the opportunity to lead as well



OUR MESSAGE



“Intangibles”



RECRUITING PHILOSOPHY

Our Recruiting Program Is Critical To the Corps' Future



We make it a priority.



We assign our best people.
We recruit what we are.



We empower them.



We recognize achievements,
contributions, and sacrifices.



MARINE CORPS LEGACY TO THE NATION

**"THROUGH A MARINE CORPS EXPERIENCE,
THE CORPS RETURNS BETTER CITIZENS TO SOCIETY -
TRANSFORMED AMERICANS WHO ARE ENRICHED
BY OUR ETHOS, IDEALS, AND VALUES."**

**HONOR,
COURAGE,
COMMITMENT**

**YOUNG MEN
AND WOMEN OF
CHARACTER**



**MARINE WARRIORS
FOR THE 21ST
CENTURY!**



THE WAY AHEAD

- Rely on fundamental, tested principles of systematic recruiting.
- Engage senior leadership and assign the highest quality Marines to recruiting leadership.
- Recognize that young people have a strong desire for self-discipline, mental toughness, and pride.
- Reinforce military service as honorable



ANY QUESTIONS?



Fire Away!

RADM Barbara McGann

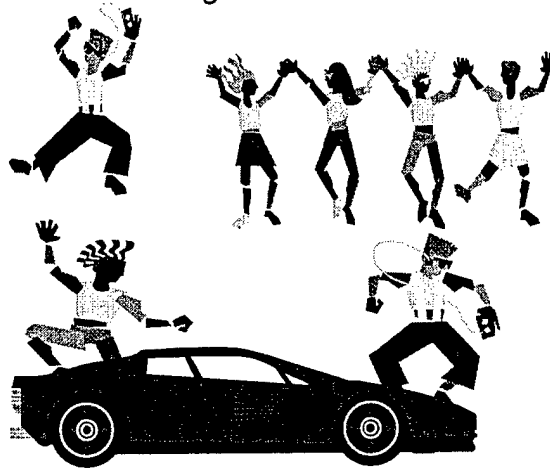
US Navy



GENERATION Y: *The Dawning of A New* *Generation*

GENERATION Y

The Dawning of A New Generation



Who they are demographically

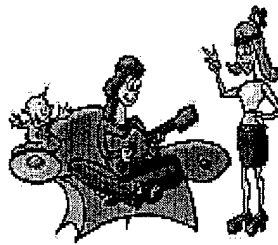
- The Gen Y demographic consists of children born between 1979 and 1994 - they are as young as five and as old as 20
- Compared to past generations, they are more racially diverse - one in three is not Caucasian
- In addition, one in four lives in a single-parent household and three in four have working mothers



Source: Business Week, Feb. 15, 1999

Who they are psychographically

- Compared to their apathetic Gen X predecessors (the aging 20 and 30 somethings), they are upbeat, socially aware and confident in their ability to make a difference
- They are broken out by teen 'tribes' defined by their fashion, music and magazines (i.e. 'Ravers' listen to techno groups and read magazines such as Vibe)



Who are their role models?

- According to focus groups, 47% of teens said that their parents were their role models
- Other role models cited were Rosie O'Donnell for her charity work, Claire Danes for going to Yale and Bill Gates for 'ruling the world'



What their future holds

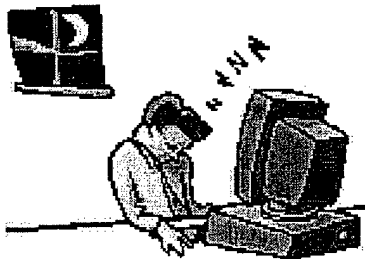
- 81% of teens said their No. 1 objective for the future is to have a well-paying job
- Their hopes for the future promise a generation that is pragmatic, but morally stable



Source: Primedia/Roper National Youth Opinion Survey

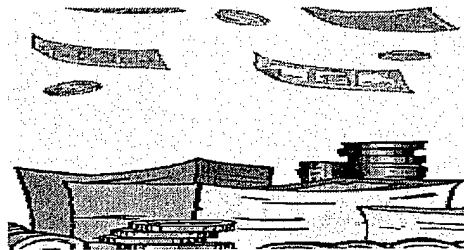
A generation apart

- Today's youth is shaped by digital media - everything from PCs to the Internet to cellular phones
- Digital media such as the Internet enhances Gen Y's intellectual and social sophistication by increasing their access to information (i.e. a teen in Idaho can be as fashion savvy as a teen in New York City)
- To them, knowledge is cool -- it's power



Buying power

- According to Mediamark, teens have an annual purchasing power of \$141 billion
- Although they have after-school jobs, studies show that their main source of income is their parents
- As such, they are extremely attractive to a significant number of marketers due to their thick wallets and plenty of free time



Are they brand loyal?

- Due to their media savvy, teens today have proven that they can be both elusive and fickle
- But there is one condition - loyalty in their world represents six to eight months, afterwards, they'll move on to the next big thing
- Marketers need to keep in mind that this generation is not shopping on price. Instead what they want is style and quality.



Are they brand loyal? (continued)

"People tend to say that teens are brand disloyal, but if they trust the brand, they are extraordinarily brand-loyal. If they don't trust the brand, they run away screaming."



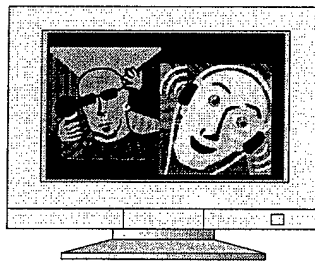
- Dan Pelson
President & CEO of Bolt.com

Reaching this generation

- Gen Y forms a less homogenous market than their parents' generation due to several factors:
 - Their racial and cultural diversity
 - Fracturing of media (proliferation of cable channels vs. network TV, fragmentation of publications, i.e. Teen People)
 - Rise of Internet
- Gen Y has grown up in a more media-saturated and brand-conscious world than their parents
- However, Nielsen Research reports that teens today watch less television than 18-49 year olds
- Instead they spend more time online than any other demographic

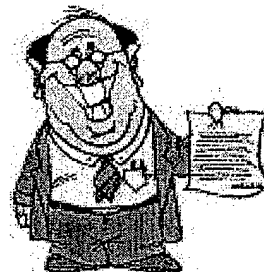
The Net Effect

- If Baby Boomers were known as the TV generation, then their children are the web generation
- The Internet is the Gen Y medium of choice - it's how teens keep up with the fashions, fads and trends as they emerge
- According to an analysis in *Business Week* (2/15/99), "a well-designed web site is crucial for any company hoping to reach the under-18 consumers".



Pitch the truth

- When it comes to advertising, Generation Y is more jaded and a bit more skeptical
- As such, they consider themselves immune to the tricks of the advertising trade
- They recognize their power and readily reject false images. If a marketer is being dishonest, it will ring false to them and set off their 'B.S. detectors'



Tricks of the trade

- Teens are receptive to marketing messages as long as the messages are pertinent, well-executed and exciting
- As such, image-building campaigns are less effective with Gen Y than with other consumers - instead they respond to humor, irony and the unvarnished truth (i.e. Sprite's popular tagline, "Image is nothing. Obey your thirst" does well with teens.)

How to market to Generation Y

- To be successful with Gen Y marketing, you have to listen to kids carefully and be prepared to move quickly
- Companies should involve teens in the marketing of their product or service by appealing to them through lifestyle, entertainment or their community
- Another tactic to break through Gen Y's distrust is to market campaigns more subtle and more local, i.e. sponsor community events or hand out T-shirts at ball games and concerts



Coming of Age

- Gen Y's distinctive buying habits displayed today will most likely follow them as they enter into young adulthood with more spending power
- Therefore, marketers that don't click with Gen Y today can lose out on a vast new market in the future
- As Edward Winter of the U30 Consulting Group puts it, "Think of them as this quiet little group about to change everything".

Implications to Navy

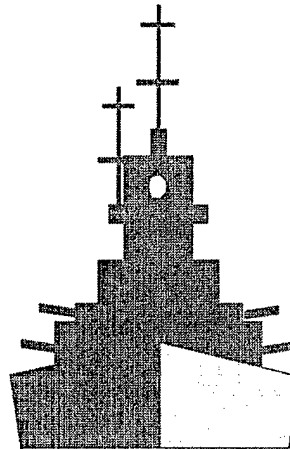
- New campaign is in line with Generation Y's attitude of being honest and real
- Campaign provides truth in advertising by showing real Navy Sailors talking about real Navy life
- Use of sport hero David Robinson in magazine editorials and Infomercial is hip, yet credible
- Overall, the campaign connects with today's youth in a relevant, identifiable and credible way

A DAY IN THE LIFE OF A NAVY RECRUITER

- THOUGHT - MAN THE FLEET
- AIM - MAN THE FLEET
- VISION - MAN THE FLEET
- INITIATIVE - MAN THE FLEET
- MOTIVATION - MAN THE FLEET
- BELIEFS - MAN THE FLEET
- LIFE - MAN THE FLEET
- DESIRE - MAN THE FLEET
- MISSION - MAN THE FLEET

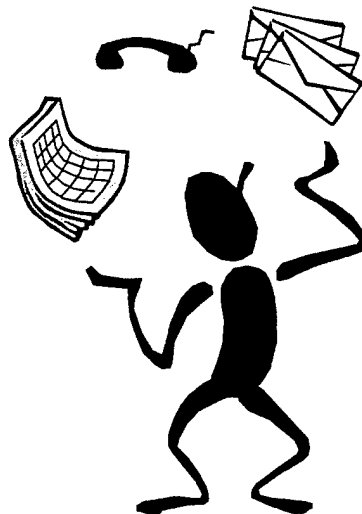
IT ALL ADDS UP TO

GOAL!!



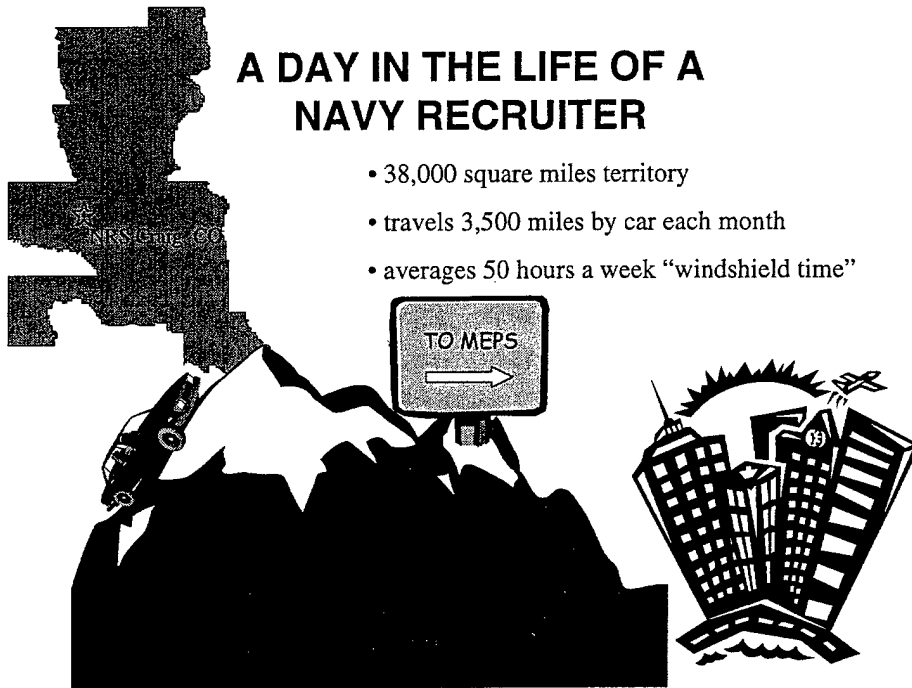
A DAY IN THE LIFE OF A NAVY RECRUITER

- A recruiter's schedule varies from day to day depending upon his or her many tasks and situations.
- Whether prospecting or processing or canvassing the community, a recruiter covers a lot of territory.
- Here are some real world experiences of a recruiter in Craig, Colorado



A DAY IN THE LIFE OF A NAVY RECRUITER

- 38,000 square miles territory
- travels 3,500 miles by car each month
- averages 50 hours a week "windshield time"

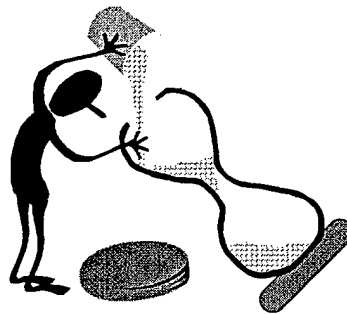


A DAY IN THE LIFE OF A NAVY RECRUITER

There are so many unpredictable situations and scenarios in the day to day life of the Navy recruiter.

Recruiters are always prospecting... always blueprinting the young people they meet.

Time is the most precious commodity in the life of a recruiter.



VADM Patricia Tracey
Deputy Assistant
Secretary of Defense
(Military Personnel
Policy)
Office of the Secretary of
Defense

*Current Trends and
Challenges in Military
Personnel Policy*

Current Trends and Challenges in Military Personnel Policy

VADM P. A. Tracey
Deputy Assistant Secretary of Defense
(Military Personnel Policy)

Agenda... Trends

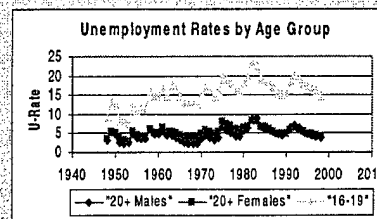
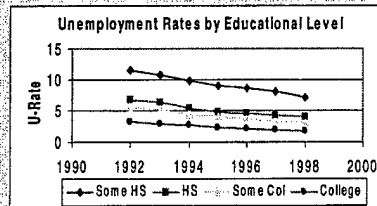
- ◆ The Booming Economy
- ◆ Shifting Retention Patterns
 - ✓ Where We May Be Headed
- ◆ Dealing with New Generations
- ◆ Emerging Patterns in Tempo

Military HR System

- ◆ Where Are We?
- ◆ Inhibitors to Success
- ◆ What We Need

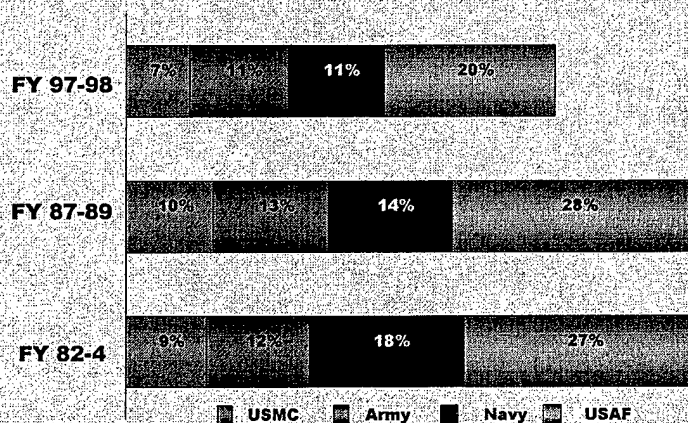
The Booming Economy--

- Unemployment rate by education level shows all groups experiencing decline
- Unemployment rate for "HS grad" in 1998 equal to unemployment rate for "some college" in 1994
- Unemployment rate by age groups including youth also show declines



Shifting Retention Patterns--

Accessions Remaining to Year 12
Under Retention Environment of Fiscal Years Shown

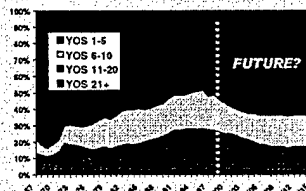


If Poor Retention Persists...



Army...

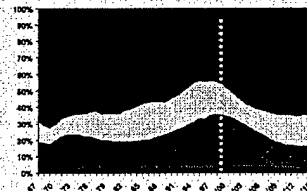
Percent of Retained Force
in Cohorts Shown



Navy...

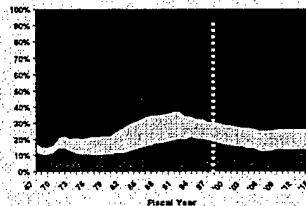
NCO Experience
Deficits?

Percent of Retained Force
in Cohorts Shown



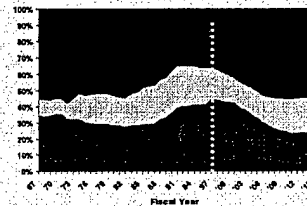
Marine Corps...

Percent of Retained Force
in Cohorts Shown



Air Force...

Percent of Retained Force
in Cohorts Shown



Projection Based on FY 97-98 Average Continuation

The New Generations--



1946

1963

1977

Matures

Boomers

Xers

Y

> 53

36 - 53

22 - 36

< 21

Lifelong Job

Terrific Job

Terrific Life

Terrific Life & Job

My Employer

My Profession

Myself

My Team

**A Week at Christmas
When Plant Closes**

**Two Weeks
Whenever
I Can Get Them**

**As Many Weeks
As I Want
When I Want**

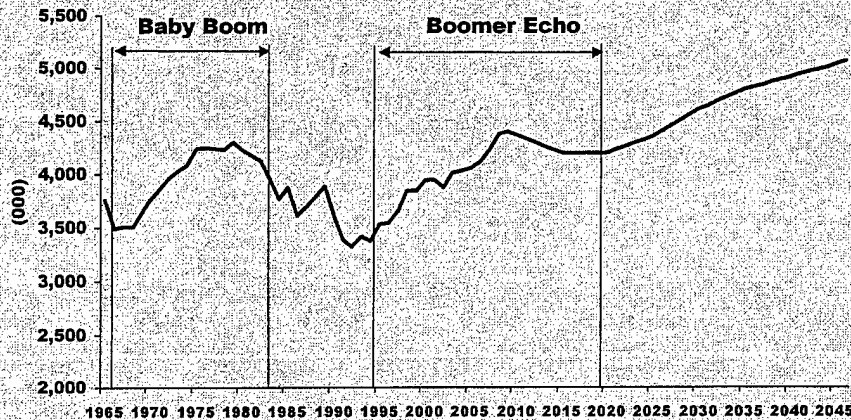
**Balance Work
and Leisure...
But Get Income**

- Fill My Toolbox
- Quick Feedback
- Independence & Creativity

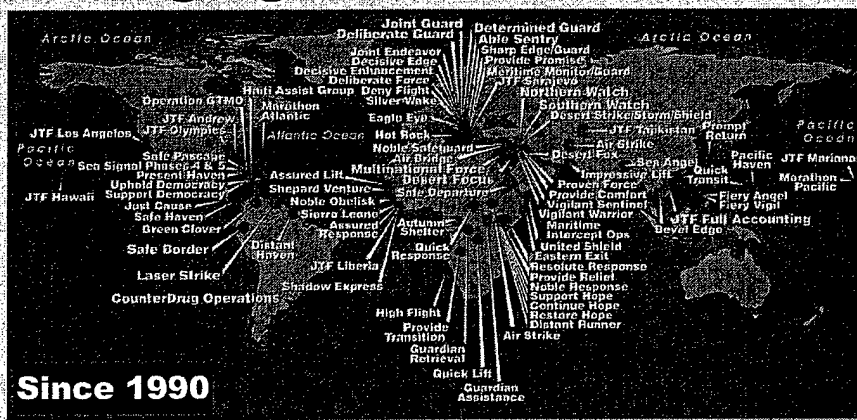
- Advanced Skills
- Management Training
- Job Security
- Help in Dealing with Older Generation

Sources: Rainmaker Thinking; Yankelovich Partners

Annual Population ...(18 Year-Olds)--



Emerging Patterns in Tempo--



- **Army** - Deployments up 300 percent in 10 years
- **Navy** - Deployed Navy ships on any given day up 52 percent
- **Marine Corps** - Calls to respond to crises tripled
- **Air Force** - Deployments quadrupled since 1986

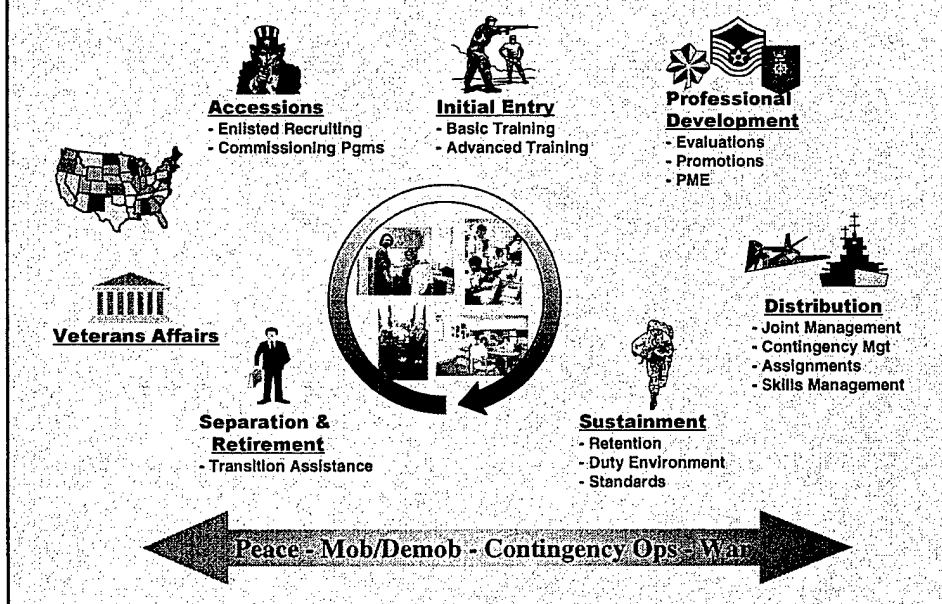
Military HR System--

Exists to Make Warriors

It Must...

- ◆ **Fill Today's Jobs**
- ◆ **Grow Military Leaders**
- ◆ **Fulfill Individual Needs**

Military Personnel Life Cycle--



Where Are We--

- ◆ **Adapting to New Steady State**
- ◆ **Addressing Space / Face Imbalances**
- ◆ **Documenting / Prioritizing Requirements**

Sustainment--

- ◆ **Must be “Employer of Choice”**
 - ◆ **Important Work**
 - ◆ **Cohesion**
 - ◆ **Reciprocal Commitment**
 - ◆ **Opportunity**
 - ◆ **Options/Flexibility**
 - ◆ **Conducive to Family Life**

Accessions--

- ◆ **Succeed in a Competitive Market**
 - ◆ “Employer of Choice”
- ◆ **Regenerate Awareness**
- ◆ **Communicate a Sense of Purpose**

Development & Distribution...

Balancing Unit and Individual Readiness--

- ◆ **Sequence/Duration of Assignments**
 - develop depth
- ◆ **Appropriate Education**
 - develop breadth
- ◆ **Promotion System**
 - identify leaders
- ◆ **Distribution System**
 - maximize unit readiness

Separation & Retirement--

- ◆ **Military - Industry Partnerships**
- ◆ **Credentialing**
- ◆ **Transition Assistance**
- ◆ **Channeling to Reserves**

HR Imperatives for Success...

- ◆ **Adapt to Changing Structure**
- ◆ **Promote Cohesion in Disparate Workforce**
- ◆ **Employer of Choice Amidst New Economy and Demographics**
- ◆ **Balanced Public Understanding**
- ◆ **Excellent Tools for Innovative Policy Analysis**

What Do We Need--

Generally...

- ◆ **Manpower Process**
 - Account for all requirements
- ◆ **Personnel Management System**
 - Balance strength to meet requirements
- ◆ **Management of Deployment Cycles**
 - Service
 - Joint
- ◆ **Improved Management Systems**
 - DIMHRS...

What Do We Need--

OR-Specific...

- ◆ **Grasp - Economic, Demographic, and Other Trends**
- ◆ **Push (Math) Envelope to Model Future**
- ◆ **Insight - Deployment *vs.* Retention**
- ◆ **Clarity of Tradeoff Choices**

Congressman Steve Buyer
House Armed Services
Committee

*DoD Recruiting and
Retention
Mini-Symposium
Remarks*

DOD RECRUITING AND RETENTION SYMPOSIUM
SEPTEMBER 29, 1999
REMARKS—CHAIRMAN BUYER

**THANK YOU FOR YOUR HARD WORK; HELPING MANAGERS
UNDERSTAND PEOPLE ISSUES IS CRITICALLY IMPORTANT TO FINDING
THE MANAGEMENT SOLUTIONS TO FIX RECRUITING AND RETENTION.**

It is difficult to overstate the importance of the role you play in helping decision makers understand people issues.

I would encourage you to continue to improve those very important tools, to share information, and to explore new technologies—the readiness of our military forces relies directly on your work.

I can assure you that the Congress values your work highly and puts your analysis to good use. Although the merit of your work does not guarantee managers will heed your advice and counsel, good analysis is the starting point for any sound recruiting and retention strategy.

**I WOULD LIKE TO DISCUSS SEVEN AREAS WHERE I BELIEVE A
DIFFERENT POLICY OR APPROACH WOULD ENHANCE RECRUITING
AND RETENTION.**

In another sense, these seven areas represent opportunities for the administration, the Congress, and the services to “do the right thing the first time” and find solutions to recruiting and retention problems.

The seven areas are:

1. Inconsistent/11th Hour Funding of Recruiting Accounts.
2. Getting Smarter on Advertising.
3. Protecting Recruit Quality.
4. Appealing to Intangibles in our Youth.
5. Realizing the Force and Veterans are not Telling a Good Story.
6. The “Socialization” of the Military.
7. The Stress of Deployments on the Force.

ISSUE #1

**THROUGH INCONSISTENT/11TH HOUR FUNDING OF RECRUITING
ACCOUNTS DOD HAS ADDED TO ITS RECRUITING WOES.**

**Some reasons why recruiting is difficult are well known and unlikely to
change in the near term, barring a collapse of the economy.**

Challenges to successful recruiting are well known—strong economy, higher college enrollments, reduced propensity to enlist, shortage of quality recruits. There is no evidence that the environment has changed or is likely to change in the near term.

DOD, however, appears to be hurting its recruiting effort, because of poor budgeting and execution practices.

SERVICE	FISCAL YR	PRIOR YR EXPEND	PRES BUD	ACTUAL	RECRUIT SUCCESS	ES FLOOR COMPLIANCE
NAVY	1998	7,324	6,424	7,697	FAILED	FAILED
ARMY	1999	11,544	9,899	12,066	FAILED	FAILED
AIR FORCE	1999	4,433	3,762	7,266	FAILED	FAILED

**CHART 1. INVESTMENT-PER-RECRUIT
(CONSTANT FY 2000 DOLLARS)**

CHART ONE—This chart presents the budget process by service for select years and would suggest that inconsistent budgeting of recruiting programs has contributed to failed recruiting.

Despite being well aware of recruiting challenges, the President's budget request continues to fund critical recruiting programs at levels well below what was executed in the previous year.

While I grant you that the source of recruiting failure is not money in all cases, it appears to me from the data on the chart that the services' unwillingness to do the right thing the first time, by providing enough money in the budget process, made the opportunity to fail more likely.

I would like to make two points about CHART ONE.

1. The market place is unforgiving of inconsistent marketing.

The market place is very unforgiving of marketing strategies that do not carry the commitment and dedication of the institution. Inconsistent and late funding of advertising and sales operations creates ineffective messages in the market place. Sales operations cannot flourish when the message is intermittent and the value of the tools provided the sales force fluctuate.

Restoring funding in the year of execution works for readiness programs, procurement programs, and even retention programs—but not for recruiting programs. The services must do better to make the case for recruiting at every step in the budget process.

2. 11th hour budgeting is an open invitation for Congressional involvement.

Normally, the services work very hard to avoid Congressional involvement in programs. Any evidence suggesting a lack of budget discipline invites Congressional "meddling," as seen by many in the Pentagon. However, this problem is visible to the Congress and can't be avoided given the focus on recruiting.

If the services are not prepared to do the right thing the first time, we in the Congress have little choice but to engage the issue at a level of oversight where we believe we can influence the direction of the program.

SERVICE	FY 1999 PROJECTED	FY 2000 PLAN	FY2001 PLAN
ARMY	12,066	10,116	9,361
NAVY	8,354	9,003	6,935
AIR FORCE	7,266	7,900	7,740
MARINE CORPS	6,187	6,077	6,201
TOTAL	9,799	9,524	8,517

**CHART 2. INVESTMENT-PER-RECRUIT
(CONSTANT FY 2000 DOLLARS)**

CHART TWO—This chart would indicate there is no evidence that service attitudes about the budget process are changing—investment-per-recruit is going down in FY 2001.

This second chart would indicate that the services are still not committed to sound planning in their marketing program. Overall there is a 10% reduction in the rate of investment per recruit between FY 2000 and FY 2001. Included in the Navy number is a 50% reduction in the advertising investment-per-recruit.

The only service that does not show a reduction is the Marine Corps. Given the relative success of the Marine Corps' recruiting program in recent years, I think there is a valuable lesson in this chart and the previous chart that should be taken to heart by the Army, Navy, and Air Force.

Do you believe that McDonald's or Coke would operate their marketing program in this way? I don't think so.

SERVICE	RECRUITING RESOURCE	FY 1998 ACTUAL	FY 1999 PRES BUD	PERCENT REDUCTION
ARMY	RECRUITING OPS	\$112M	\$76M	32%
NAVY	ADVERTISING	\$69M	\$35M	49%
AIR FORCE	ENLISTMENT BONUS	\$17M	\$2M	88%

**CHART 3. RECRUITING BUDGETING EXAMPLES
(MILLIONS OF DOLLARS)**

CHART THREE—Here are several examples of how the services have eaten their seed corn in the recruiting budget process.

This chart shows some examples of how the services have tried to take savings in recruiting programs that have worked to their disadvantage, in my view. Each compares the FY 1998 executed budget with the FY 1999 President's budget request.

As you depart a tough year and enter a new year that promises to be equally challenging—

You must not allow recruiting operations to be cut by 32%, as the Army did.

You must not allow recruiting advertising to be cut by 49%, as the Navy did.

You must not allow enlistment bonuses to be cut by 88%, as the Air Force did.

All were ultimately restored at the last minute, so to speak, by the Congress or the service, but the point is the services did not do the right thing the first time. As a result, there were thousands of people who had spent months planning on how they were going to survive with less money. A late influx of resources, while welcome, could not be used effectively; and the damage to recruiting was already done on the first day of the year.

CONCLUSION, consistent/on-time money is the key to recruiters being able to work smarter, and not just harder.

Money must accompany any effort to respond to recruiting challenges because the money provides the tools that allow you to work smarter. Working harder only gets you so far in recruiting. I think our enlisted recruiters are a living testimony of the truth in that statement.

How many read the September 23 article in the Wall Street Journal about Staff Sergeant Daniel Cady, an Air Force recruiter. Although talented, hard working, committed, Sergeant Cady is probably on his way to a career mishap because he is unable to meet his recruit quota despite the dedicated application of all his skills.

I found the article a very disturbing signal that we are off the track in recruiting. I think one of the important missions of this symposium is the develop the tools that will send clearer signals to managers about the needs of people programs before they become disasters.

ISSUE #2

CIVILIAN AND UNIFORMED LEADERSHIP MUST GET SMARTER ON ADVERTISING TO MAXIMIZE THE EFFECTIVENESS OF THE SERVICE/ CONTRACTOR MARKETING TEAM:

Willingness to learn about each other is the key to a cohesive team relationship between the service and the advertising contractor.

The services have got to do a better job of educating themselves on the advertising business. Not only does sufficient money have to be invested on time, there must also be an integrated effort to bring a consistent message to the market place.

The service leadership, the recruiting community, and the advertising agency must meet the advertising challenge as a cohesive team. That requires everyone in the process to work hard to learn about the service's needs, develop a marketing strategy, and implement that strategy as a team.

Participation of uniformed members is particularly important to an effective marketing message.

The challenge to become expert in the art of the advertising business is particularly important for the military member of the team. We need to listen to the advice and counsel of the marketing professional, but in the end, the best results come only when the marketing strategy reflects the core values of the product it sells.

In the end, it must be the people that have lived the military profession who bring those critical insights and subtle refinements to the final product.

We can only make advertising work to our advantage when we understand commercial marketing processes.

I recently read an article about the recent trend for advertisers to demand magazine publishers to produce hard evidence the magazines actually deliver sales and brand awareness. We need to be just as smart, tough, and demanding as those advertisers.

We need to be smart enough to make the system work for us.

CAUTION: Do not get so wrapped up in the process of reassessing your recruiting message to the point where change is mandatory. An example would be the well publicized potential for the Army to quit "Be All You Can Be." Throwing overboard the second most recognized advertising slogan of the last 100 years just to demonstrate that you are capable of change would be a tragic waste. I want to state for the record now that

I would be opposed to any such initiative and that I believe such an decision would not be well received by the Congress.

ISSUE #3

RECRUIT QUALITY IS STILL KING.

Quality counts—first, because it saves money and improves effectiveness.

Quality counts—it counts in training time and cost; it counts in retention; it counts in readiness and combat capability.

It does all those things, and when we walk away from quality, it is at our own peril and the peril of our great nation.

Perhaps not all of us, but most of us can remember the quality problems of the hollow force—I for one don't want to return to those dark days.

The easy solution—cut quality—must be resisted.

When recruiting is under stress, it is very tempting to just slice off a little quality to make the recruiting goal. It happens in very subtle ways—a few more felony and moral waivers, a marginal edging down in test scores, or less emphasis on education requirements.

These temptations must be resisted and erosion of quality standards must be approached cautiously and managed closely.

I am reserving judgment on the decision of the Army and the Navy to accept the minimum number of high school diploma graduates, and the Army's new initiatives to review quality standards.

I am aware of the decision of the Army and Navy to accept non-high school diploma graduates at the minimally acceptable DOD standard of 10%. I am concerned that the DOD standard is not fully validated and 10% may be too high a number. I have asked for a study to ensure we are not making a mistake.

I am also aware of the Army's College First program and new interest in recruiting candidates with GEDs. While I recognize the need to explore new segments of the market, I am reserving judgment on these programs until after they are fully tested.

Recruit quality also effects retention.

Recruit quality is not just about the fiscal advantages that quality brings to the system, recruit quality is also about retention because the people on active duty derive pride and confidence in their service when they see quality in the new troops.

Believe me, after all my contacts with the NCO leaders of our military, I can report that they simply do not believe the young people coming into the military today are people they respect and want to work with.

NCOs are worried about the future of the military because they do not believe the young people are going to uphold the legacy that today's NCO is sweating blood to build.

One theme I heard from many NCOs was that the recruit quality had suffered because the services were making life too easy for recruits. As one NCO indicated, "If we get any more sensitive in the military, we will just all sit down and have a good cry."

For many NCOs, poor quality recruits is the last straw that causes them to come down on the wrong side of the retention decision.

ISSUE #4

APPEALING TO INTANGIBLES IN OUR YOUTH:

I believe duty, honor, country still have potential as recruiting themes.

I for one am not prepared to give up on the recruiting themes of duty, honor, country. I think the recommendation of the Kassebaum Baker Commission was right—recruiting advertising should refocus on patriotism and service to the nation.

The military has to offer a competitive employment package, but the intangibles are an opportunity we must not overlook.

I appreciate that the military has to offer a total employment package that is fair and competitive, but I also think we are missing an opportunity to bring to the military a major portion of the youth population by not pressing home patriotic and service to the nation themes in our advertising message.

The total package must include all the incentives that attract people to the military and the services must be thinking of new approaches all the time.

BUT, the military must not overlook the fundamental themes that have made America great—these messages may require more energy than in the past, but their power is still available to the services if they are committed to the message.

TEXT FROM EXAMPLE AD

“No 401(k). No profit sharing. No stock options.
Yet, you won’t find better benefits anywhere.

PEACE CORPS

How far are you willing to go to make a difference?”

QUOTE FROM AD EXECUTIVE

The ads are playing to the “I love a challenge” attitude of today’s younger generation. “So we got in their face with these ads, issuing challenges.”

—Steve Kuklinski, of Periscope Advertising—

CHART 4. PEACE CORPS ADVERTISING
CAMPAIGN

CHART FOUR—A new successful Peace Corps recruiting campaign seems to suggest today’s youth want challenges as much as a good deal.

The Peace Corps has launched a new recruiting advertising campaign that has been productive. Unlike military ads that down play the negatives of life in the military, the Peace Corps ads spell out the hardships and lack of benefits. The ads challenge the individual to endure the hardships while serving the nation. Obviously, the Peace Corps and their advertising contractor believe presenting this generation with a challenge will pay off. By some accounts, this appears to be working for the Peace Corps.

Chart Four—On this chart, you see some of the language that challenges America’s youth to get involved. This language is the hallmark of the Peace Corps ad campaign. Also on the page is a quote from the advertising executive who put the “get in their face” ad campaign together. This type of campaign makes me wonder if DOD is not missing the boat on what is really effective with the target population.

I think there are similarities between Peace Corps ad strategy and the ad strategy pursued by the Marine Corps. Since the Marine Corps approach has been

successful, the Marine Corps model may warrant closer examination by all the services.

Finally, when challenging America's youth to serve, the nation must also focus attention on the military and remove advertising distractions like AmeriCorps which offers benefits that draw candidates away from the military.

In addition to advertising that challenges America's youth, the nation must also recognize that it must focus the attention of young people by removing or downplaying competing programs.

One example is the AmeriCorps program which offers education and other benefits in direct competition with the services. Defense must be the priority and the nation needs to send that message by scaling back on advertising and benefits in other programs, like AmeriCorps, which I believe is especially damaging to recruiting.

ISSUE # 5

THE FORCE AND VETERANS ARE NOT TELLING A GOOD STORY:

The people serving our nation in uniform and veterans are not believers in a military career—and the word is getting out.

Finally, I would like to highlight an observation of mine that reflects the nature of the retention problem. The people in the force—the people who live the life and those veterans who have left the military—are not telling a good story.

Our own people end up being our worse enemy for both recruiting and retention.

Friends and relatives, and many of the people who influence potential recruits most directly are getting a negative message about the military.

NCOs are not prepared to do the hard work of convincing their subordinates that a military career is the right answer for them and their families. The NCOs simply do not believe in their own hearts that the military is the place to be today.

The force is not selling itself, and when people get out of the military, they are not doing the services any good as veterans back in "home town USA."

Turning around the attitude of the force is admittedly very difficult, but we can't afford to allow the current situation to continue.

How do you turn it around? You have to attack all the factors that create a quality of family and working life that people value.

The challenge of attacking all the factors that create a quality of family and working life is obviously a major undertaking, but it is an objective worth pursuing.

A solution would have to include a budget that is adequate and has the proper balance between people, readiness, and procurement.

A solution would have to include a national leadership that is committed to exercising great caution before employing military forces in a contingency operation, and then only when the compelling national interests are involved.

Although fixing some of these problems is well beyond the authority of the people in this room, we must all remain dedicated to doing the right thing the first time on people issues.

Undoubtedly some of these issues are well beyond the ability of anyone in this room to control.

The fact that we do not have control over these issues does not relieve us of the responsibility to do the right thing the first time when we have the opportunity.

I am committed to doing right by our people in the military, and would implore you to do the same when given the opportunity.

ISSUE # 6

THE "SOCIALIZATION" OF THE MILITARY IS CORROSIVE TO READINESS AND DETRACTS FROM THE WAR FIGHTING SPIRIT—AND AT THE END OF THE DAY, DRIVES PEOPLE OUT OF THE MILITARY:

Remembering the story of the NCO who said that if the military was going to get anymore sensitive everyone would have to sit down and have a good cry, it is clear that the socialization of the military is being actively pursued.

The NCO that worried about the military being too sensitive reflects just one view of how the socialization of the military is damaging readiness. Sensitivity training for a wide variety of social concerns, including homosexuals in the military; trainee time-outs and stress cards; reduced fitness and job performance standards; promotion of lesser qualified service members due to favoritism and/or quotas; and reduced job qualification standards are but a few examples of how the military is being socially engineered.

Social objectives are at risk of consuming the military robbing military people of readiness, the warrior spirit, and the desire to stay military.

What must the young recruit think when his challenging military experience begins with a series of briefings on how to behave and performance tests that simply do not challenge him. Social issues should not be ignored, but we are at risk of doing damage to combat capability if we are not prepared to put limits on the socialization process. What effect does the watering down of standards have on the young service member. I have to think that such a service member is much more likely to be a marginal performer and less likely to make the military a career.

The war time challenges of the military require that its standards be different and held apart from society as a whole.

The military should be acknowledged as an institution that in some instances must be kept separate from the standards of society as a whole. The combat mission demands that some social objectives be put aside to ensure that readiness and the warrior spirit flourish.

ISSUE # 7

DEPLOYMENTS MUST BE MANAGED TO REDUCE STRESS ON THE FORCE AND PRESERVE COMBAT SKILLS—AND HOPEFULLY SAVE RETENTION:

Military people are getting worn down by a foreign policy that has little understanding of the needs of military people and little regard for what is compelling national interests.

One of the most important reasons why service members leave the military is the operations tempo that takes them away from their families and stresses their endurance. The national leadership must recognize that the ability of military people to absorb excessive operations tempo is not without limits.

Peacetime contingencies such as peacekeeping, peace enforcement, and humanitarian missions must be approached with caution and only when national interests are direct and compelling. We cannot hope to retain a capable combat force if we continue to allow military people and resources to be consumed with missions that have little connection to national security.

In addition to consuming people and resources, retention suffers when service members are called to perform the duties of a policeman when they signed up to be a soldier.

Aside from the stress of high operations tempo, I believe that our peacetime missions with peacetime jobs are causing people who wanted to be soldiers to opt out of the military. Being called upon to feed the hungry and keep the peace are not what many of our people joined the military to do. The roles and the missions are simply wrong for the military and people are going to react on a personal level.

The analogy would be for the new policeman who had been trained to walk the beat and confront crime in his community to be assigned to the school crossing. It won't work and the similar situation of putting the military on every humanitarian mission won't work either. There has to be limits to these missions, or the military stops being effective and the people will move on to something else.

I will be very direct. It is of great concern when our Secretary of State states, "What good is a military if we don't use it."

What would you do with the policeman who says, "What good is my gun if I don't use it." You would sit him down and teach him some self discipline and restraint.

Likewise, we should have a policy of restraint to intervene in conflicts only when supported by the most compelling national security interests.

In conclusion, I would like to leave you with one additional thought. The military must not allow its standards for conduct and behavior to be eroded. The American public respects the military because of those high standards.

Thank you.